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# Conference Planning

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# Conference Planning





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## INTRODUCTION

Every year, hotels, universities, private clubs, and community centres across North America open their doors to commercial enterprises, voluntary organizations, citizens groups, professional associations, and government departments for the purpose of holding a conference.

While some of these conferences may be deemed an outstanding success, many fall short of the goal set by sponsoring bodies, and often fail to meet the expectations of those who attend. Undoubtedly, much of this failure is due to inadequate planning.

In planning a conference, it is essential to define goals and priorities, identify and examine the potential audience, agree on a strategy, look at practical considerations (e.g. available financial and human resources, accommodation requirements, possible locations), and build in some means of assessing and evaluating what has been accomplished.

Over the past few decades, there appears to have been a commonly accepted assumption that conferences can solve almost any problem or fulfill any purpose. To some degree this may be true, but it must always be kept in mind that alternative courses of action may in many instances be considerably more appropriate than the conference format.

This manual is a collection of guidelines for those interested in participation and involvement within a conference setting. No attempt is made to suggest alternatives to holding a conference.

It is hoped that, by working through the suggestions below, organizations and individuals interested in holding a conference in the future will have a better understanding of the potential advantages and structural limits of this particular communicative medium.

### **Defining Goals and Priorities**

One may use a conference as a launching point for a program of action, as a learning process for participants, as a means of attracting publicity or arousing public interest around certain issues, or for many other purposes.

The following are some of the more common goals:

- (a) To convey specific information to a group of people
- (b) To stimulate a group of people to be more involved in a specific project or area of interest
- (c) To provide an opportunity for people who share common interests or experiences to meet and exchange ideas
- (d) To animate people to participate in community life regardless of their particular interests
- (e) To test an idea or hypothesis on a group of “informed” people
- (f) To test an idea or hypothesis on a random sample of people
- (g) To “sell” an idea or product
- (h) To improve inter-personal relationships and/or morale in a given setting

Frequently one’s goals will encompass a number of these and other factors. However, for the purposes of planning a conference it is important to be able to articulate these goals and list them in order of priority.

### **The Potential Audience**

Having defined the goals, it is then possible to identify a potential audience. At the outset, it is perhaps wise to ignore practical considerations and attempt to identify all those who ideally might attend. By so doing, it is much easier at a later date to set limitations on participation while maintaining the kind of representation one wants or needs.

The size and composition of the group will greatly affect the kind of structure needed to bring about maximum communication and involvement at the conference. In turn, both factors will determine accommodation needs.

Most of us are successful in reaching colleagues in our own profession, the perennial conference goer, or those who see their own interests clearly at stake. The ultimate question is how can one reach the so-called “inarticulate” groups or individuals in our society – those who do not participate, seem uninvolved, or appear uninterested.

A slight over-representation of such groups in the planning body is suggested as one means of involving them. Secondly, a larger portion of the publicity may be specifically directed towards them.



Having identified a potential audience, consider the following: Will they be free to attend? Are they part of the labour force? Are they within reasonable proximity to the suggested conference site? Do they speak the same language? Do they have access to the same information? Can they afford to pay transportation costs or a registration fee? Will day care present a problem for them? Do they follow religious or cultural traditions which may affect their participation or involvement (e.g. dietary laws, role limitations.)?

In view of these or other similar factors one should consider the advantages and/or disadvantages of holding a national, provincial, regional or community conference and the basic structure necessary to accommodate the special needs of the group.

### **Agreeing on Strategy**

To some community organizers, group leaders, and staff development people, the word 'strategy' smacks of manipulation, paternalism, or outright deceit.

However, where a group of people are involved in a planning process, agreement on strategy is of paramount importance. It is vital to establish a set of clearly stated ground rules designed to achieve the goals and accommodate the priorities already agreed upon by the group (e.g. persons, if any, to receive special consideration, budget priorities, the kind of representation desired in various sessions. Otherwise, for example, planning committee members may select program participants whom they support ideologically or professionally but who cannot provide the input necessary to achieve conference goals.)

It is important that one's strategy be sufficiently flexible to allow individuals involved in the planning the necessary freedom of action to organize, promote or co-ordinate a given aspect of the conference without compromising on overall goals.

### **Example**

In organizing a community conference which is to include representatives from all sectors of the community and focus on their relationship to the total community, individuals will require considerable freedom of action in terms of publicity, promotion, and structure of sessions, to successfully involve the many diverse groups. However, sessions focussing on the special concerns of one group (e.g. students, the poor, the single parent family), cannot exclude representatives of other groups if these problems are to be viewed in the context of the total community.

## **The Budget**

In drawing up a budget, the following factors must be considered:

- (1) Promotion and publicity
- (2) Accommodation and facilities
- (3) Speakers, panelists, group leaders, technicians, commissioners, etc.
- (4) Meals and entertainment
- (5) Telephone calls, postage costs, etc.
- (6) Administrative and clerical assistance
- (7) Printing of programs, folders, reports, etc.
- (8) Supplies (e.g. paper, label cards, sound equipment, signs, display material)

It is vital to obtain estimates on major expenditures and, if estimated expenditures are in excess of available funds, one might consider the following:

- (1) Charging a registration fee
- (2) Soliciting voluntary donations
- (3) Recruiting volunteers to organize and staff the conference

If the conference is being sponsored by a voluntary agency, citizens' group, or other organization working with a limited budget, it may be desirable to conduct a fund raising campaign. Funds can often be obtained from private donors, industry, foundations, or government departments. In return for their financial assistance, most contributing bodies will expect to be included in the credits on printed material, asked to take part in the conference as speakers, or asked to provide some kind of display. Groups who are repeatedly going to the public for financial assistance are very conscious of the importance of giving their donors public recognition.

## **Human Resources Available**

Attempt to identify all those persons who can contribute to the planning or the activities of the conference. It is extremely important to include representatives of the various interest groups you hope to involve in the conference. All too frequently, conference planning is left to experts who have a wide variety of talents and skills but who cannot relate directly to some of the less articulate segments of the population.

In addition to representatives of various interest groups, consideration should be given to persons who have special technical, organizational, or group leadership skills, persons who can make

an academic contribution, public relations people, media representatives, and so on.

Do not overlook the possibility of utilizing many willing and competent non-professionals in the community. Where the assistance of professionals is available, attempt to utilize their contacts or special skills rather than involving them in a host of details which can be handled by community volunteers.

## **WHERE TO BEGIN**

It is essential to realize that one cannot plan and organize a conference alone. While it is possible to hire or appoint a professional or outside co-ordinator who may be highly skilled in the mechanics of organizing a conference, his role should not be confused with that of the planning committee.

The professional co-ordinator can be most effective only when a sponsor can provide:

- (1) A clear definition of conference goals.
- (2) An approved operating budget to purchase goods and services.
- (3) Some general guidelines, e.g. desired audience, possible dates, time allowed.

In most circumstances the role of the planning body is to make these kind of decisions.

In the majority of cases, groups do not have the resources at their disposal to hire a professional co-ordinator. Instead they select one of more members of the planning body to fulfil this role. In fact, this is in many ways a more desirable arrangement for groups interested in developing leadership skills.

## **HOW TO CHOOSE THE PLANNING COMMITTEE**

If a planning committee is to be effective, the number of members should be limited. In the case of very large conferences, it is preferable to set up a number of sub-committees to deal with specific aspects of the conference rather than having all of these people represented on the major planning body.

Members of this committee should have time, resources, and skills to contribute. In some instances, a person with a host of contacts or a person who has considerable status in the community may be

included to gain recognition and publicity for the conference. However, beware of overloading the planning body with such people unless they are prepared to do a considerable amount of work on your behalf. While a conference may be "successful" in the view of those who read the newspapers, it may completely fail to achieve your goals.

What kind of representation, then, should one strive for on the planning body?

- (1) Representatives of the various interest groups you hope to involve.
- (2) Persons who have either extensive knowledge and/or experience in the areas to be covered at the conference.
- (3) Persons who have strong organizational abilities.
- (4) Persons who have some knowledge or experience in promotion, public relations or other media fields.
- (5) Persons who have a knowledge and understanding of group dynamics.

For the majority of conferences, the planning committee need not exceed 10-12 persons. Where conferences are extremely large and complex in structure, professional assistance may be required.

### **Example**

If a conference were concerned with evaluating social welfare services, the central planning body might include:

- ( 1) a representative of the press, radio or TV
- ( 2) a poor person
- ( 3) an unemployed person
- ( 4) a recent immigrant
- ( 5) a senior citizen
- ( 6) a student or drop-out
- ( 7) a single parent
- ( 8) a representative of an educational institution
- ( 9) a representative from a government agency
- (10) a representative of a voluntary agency in the community
- (11) an amateur or detached worker
- (12) a business man

At first glance, such a committee appears to be overloaded with persons who may lack strong organizational skills. However, consumers of the services in question must have a strong voice in the planning activities to ensure that a comprehensive view of these services is presented at the conference. It is important to remember that the professionals involved have many more



resources at their disposal (e.g. clerical assistance, greater access to information, community support.) This means that they, as individuals, can exert a greater influence on total planning. In the planning committee suggested above, we have attempted to offset this bias.

Where one hopes to achieve any kind of social change, it is essential that representatives of the various power structures participate in the conference. However, this group alone should not be responsible for the planning.

## **CHOOSING THE CO-ORDINATOR**

Assuming that one is not hiring a professional co-ordinator, one would look for a person with strong organizational skills and the ability to work with – and give direction to – a very heterogeneous group of people. He should be well informed about the issues at hand, but need not be a specialist in these areas. His most important function is to ensure that those involved in the planning process are able to work together on strategy and meet work deadlines. His role and lines of authority should be clearly defined as it is virtually impossible to function in this capacity without considerable freedom of action.

## **PLANNING COMMITTEE MEETINGS**

So long as the activities of the planning committee are co-ordinated and in line with strategy, the frequency, composition and agenda of individual meetings should be kept as flexible as possible to accommodate the individual needs of committee members.

If possible, at one of the first meetings the co-ordinator should present an all-inclusive statement on goals, projected expenditures and conference structure. A concrete presentation helps to focus the attention of a newly formed committee on the issues at hand and can eliminate much fruitless discussion. Committee members can question the validity and/or feasibility of his presentation, and alter or add to it where necessary or desirable.

Early in the planning stages, goals should be clearly defined, the potential audience examined, and a strategy agreed upon.

Once planning is well underway, it is seldom advisable to accept new members on the central planning body. Such changes often

result in a change of focus and a resulting shift in strategy. At best they tend to retard the progress of the committee as a group.

It is very important that the co-ordinator acquire a commitment from his planning committee at the outset and provide an opportunity for their **immediate** participation in some aspect of the conference planning. Responsibilities may be divided among committee members by organizational function or sectors of the audience.

There is no simple formula for determining the length of time required to plan a given conference.

For large, complex conferences, planning and organization can take up to a full year. However, planning time should not be excessive as the interest of committee members tends to wane.

## **CHOOSING A CONFERENCE THEME**

The most important factor in choosing a conference theme is to ensure that **all** of your potential audience can identify with it.

If you are hoping to attract one professional group, a theme which focuses on some particular aspect of their work might be appropriate.

However, when organizing a community conference, it is preferable to select a theme which conveys the importance of and need for participation and involvement in community life. It should also convey how each individual can be involved in the conference.

## **PUBLICITY AND PROMOTION**

Assuming one has a limited budget, what means can be used to publicize or promote a conference?

- (1) **Letters to local newspapers or magazine editors** arousing interest in your areas of concern prior to the conference.
- (2) **Press releases** to the editors of local press informing them about your conference.
- (3) **Radio or TV announcements.** Many radio and TV stations will provide air time as a public service, particularly if the conference is of general interest to the whole community.
- (4) **Posters or signs** in public places.

(5) **Brochures, pamphlets, registration forms, etc.**

Although an attractive brochure can be a very effective means of publicizing and promoting a conference, printing costs should be given careful consideration. Frequently, groups produce “slick” folders and brochures while economizing on activities and materials which can make the conference more exciting and meaningful to those who attend. Also, if the conference is being financed by government or from voluntary donations, very slick brochures may be considered a waste of conference funds because of their temporary nature. A reasonably simple folder can serve the needs of most groups, if the theme selected is appropriate and the information provided explicit.

Registration forms should always include the time, location, registration fee (if any), and rough outline of the program. If the form is not pre-addressed, a return address must also be included.

Those with limited funds might use amateur artists and printers enrolled in vocational schools or community colleges to reduce printing costs. Work might also be done by centres for the handicapped. If planning to use a professional printer, it is preferable to give your contract to businessmen in the community where you wish to hold the conference.

## **SELECTING A DATE AND TIME**

Conferences for professional groups are usually held within business hours during the slackest period of the year for the particular group. However, community conferences must be scheduled outside business hours to allow working people to attend. The summer months prove unsatisfactory since a large number of people are away from home on weekends and vacation periods.

The length of the conference must be determined on the basis of content, the structure of the program, and the possibility of participants attending for any given period.

## **SELECTING ACCOMMODATION**

In selecting accommodation for a conference, consider the following:

- ( 1) Will guests require overnight accommodation? If so, is it available at the same location or in the immediate vicinity? Will all guests be able to stay in one place? Is the cost of overnight accommodation prohibitive for the non-subsidized guest? .
- ( 2) The need for a registration area if guests have not been pre-registered.
- ( 3) The size of your potential audience if you have not pre-registered.
- ( 4) The availability of facilities such as sound systems, electrical outlets, black-out curtains, air-conditioning, auditoria.
- ( 5) Size and type of rooms available.
- ( 6) Parking and/or connections with public transportation.
- ( 7) What meals and social activities can be provided on the premises or in the immediate vicinity?
- ( 8) Access to the building prior and subsequent to the conference.
- ( 9) Building regulations re smoking, posting bills, serving of food and beverages, etc.
- (10) Display areas.
- (11) Proximity to social activities in the city.
- (12) Total cost of accommodation.

## REGISTRATION

Particularly if the conference is a large one, at least three weeks is required to finalize arrangements for meals, workshops and the allocation of accommodation for individual activities.

In planning either a one day or a very large conference, it is preferable to either pre-register guests by mail or on the evening prior to the conference program. If sufficient funds are available, hosting an informal reception after the evening registration is one effective means of allowing participants to meet and exchange ideas prior to the conference itself.

If pre-registering, program registration forms should be mailed out six weeks before the conference allowing participants about three weeks to return them.

Considerable time can be saved if receipts, lapel cards, meal tickets, admission cards for individual sessions, etc., can be mailed out to those registered prior to the conference. If the group is a very mixed one, it is also desirable to send out any information or reading materials at this time.





themselves. It is advisable to request that registrations be printed as some handwriting is illegible. The main registration desk can then be divided into alphabetical sections (e.g. A-E, F-L, M-Q, R-Z), the range of each unit varying with the numbers expected.

If money is to be exchanged, someone should be delegated to set up and receive the cash for each section, check cash received against the number registered in each section, and deposit funds either with the hotel or in a bank.

Lapel cards must be typed or handwritten, receipts filled out, and resource material or kits handed out.

Again, depending on the size of the conference, all of these duties may be performed by one registration person, or work may be divided among cashiers, registration clerks, and information staff.

## **SIGNS AND DIRECTIONS**

Conference planners often become so familiar with the conference site that they tend to overlook the need for signs and directions.

If one is using a very large building with an unusual floor plan or if activities are spread out throughout the building, it is sometimes advisable to provide participants with a floor plan indicating individual activities and facilities. In addition, large, colourful or striking signs should be posted in all places where persons might go in alternant directions. In a hotel, many of these signs will be provided. However, in schools and community halls, the responsibility for making and posting signs rests with the conference organizers. One may find, too, that the building selected has special regulations regarding the kinds of signs which may be posted and the kinds of adhesives or staples used.

At all times, at least one person should be on the registration desk to provide information and directions to those who have lost their way.

If finances permit or if volunteers are available, guides can be very helpful in large centres such as universities, community colleges and huge civic buildings.

## CONFERENCE STRUCTURE

The way in which activities are structured is perhaps the most important factor in determining the kinds of learning, interaction, involvement and commitment which will result from your efforts.

What can be done, then, to animate, stimulate or educate a group of people?

Consider the various activities and experiences a conference might include and the primary function they serve.

### Activity

Speech or Lecture

Group Interview

Symposium

Forum

Panel

Debate

Film

Demonstration

Tour or field trip

Film

Display or Exhibit

Multi-Media Environmental

Experiences

Experiential Training Session

Brainstorming

Buzz Groups

Workshops or Seminars

Question and Answer Sessions

Under Fire Panels

T. Groups

Discussion Groups

Meals

Social Activities

Evaluations

Polls

Surveys

### Primary Function

To convey a specific message or ensure that all in attendance have a minimum of information about the issues at hand.

To provide an opportunity for learning through direct involvement or experience.

To provide an opportunity for dialogue and feedback.

To provide an opportunity for participants to meet and exchange ideas on a very informal level.

To provide an opportunity for participants to express their views on the issues discussed and on the conference in general.



Certainly structure alone cannot make a conference effective. Your success in attracting the group you hope to reach, the quality of speakers, resource people, films, displays, etc., will also be major factors. However, "good" people can be highly ineffective if structure is not given careful consideration.

We must then:

- (1) Convey information
- (2) Create an environment that is conducive to good communication and learning
- (3) Provide opportunities for the immediate involvement and participation of those in attendance
- (4) Promote dialogue
- (5) Provide an opportunity for guests to evaluate the conference

In order to arrive at concrete decisions at a larger conference, it is essential that the group be broken up into smaller units.

Again depending on your aims, small groups may assemble voluntarily, the group may be evenly divided alphabetically, numerically, by age, by sex, or by interest, or the planning body may choose to arbitrarily assign participants to individual groups to ensure the broadest possible representation in each.

## **SELECTING SPEAKERS, PANELISTS, FILMS, DISPLAYS or MULTI-MEDIA PRESENTATIONS**

If the central feature of the program is to be a speaker or panel, one needs people who are dynamic, controversial, and well informed. An equally important factor is their ability to relate to the group on its own terms. Participants should be able to relate to the resource people as well as the issues.

At a community conference, resource people should be chosen from all socio-economic and educational levels.

Ask those selected to submit an outline of what they propose to say or do prior to the conference. Such submissions give the sponsor a better idea of what will be covered and secondly, provide him with a framework for the conference report.

Films may focus on a single point of view, present a variety of points of view and experiences while drawing no conclusions, or present a number of alternatives while strongly supporting one of them. The N.F.B.'s *Alinsky* series or the A.F.B.'s *Ghetto* for

example are effective since they evoke a highly individual response on the part of the viewer. A film which presents objective, yet general views on issues such as poverty, teacher training, community development, etc., often requires supporting activities to generate dialogue. Films selected or produced should be in hand at least two weeks prior to the conference for previewing.

Slides, film strips, film sound tracks, samples of natural and man-made products and other visual aids can be used very successfully to convey information through direct experience. If the content is familiar to the group, people may selectively perceive those things of which they are already aware. To avoid this, it is preferable to present familiar but unrelated sounds, smells and images simultaneously to alter one's normal perception of things. Tours and/or displays can also be used to convey information.

## **SELECTING DIALOGUE ACTIVITIES**

Large meetings or question and answer sessions can be very effective when the issues at hand can be clearly defined or identified. However, for more general areas of concern, a few speakers may dominate the session while the majority neither participate nor involve themselves in the discussion.

In dealing with issues where the response is likely to be highly individual, small workshops, sensitivity groups, or under attack panels provide greater opportunity for individual expression.

Any conference which brings together many people who are not acquainted with one another should include some kind of informal social gathering.

## **CHOOSING SESSION RECORDERS**

If a session has only one or two speakers at the front of the room, the most effective way of recording it is on tape. However, for workshops and seminars, taping is not always adequate or even desirable. If the volume is set sufficiently high to pick up all the voices in the room, it will also pick up coughs, feet shuffling and whispering. Such tapes are virtually impossible to transcribe and the cost of transcription can be staggering.

If the content of the session must be recorded verbatim, one should use a secretarial team, as relatively few secretaries can take shorthand for a full hour with no break. If, on the other hand, one requires only a general or point form report on proceedings, one person who is relatively knowledgeable in the field can fulfill this role. If a group does not have the resources to hire secretaries or rent tape recorders, one might consider hiring students in business courses or recruiting volunteers.

Reports on all sessions ought to be submitted to the sponsor by, at the latest, a week after the conference.

## **PROVIDING FACILITIES FOR THE MEDIA**

In order to obtain the best possible coverage in the communications media, it is advisable to notify the press and local radio and T.V. stations of the event approximately two months in advance. Follow up this notification with a press release giving as many pertinent details as possible about two weeks before the conference and a 'phone call perhaps three days beforehand as a reminder. In most cases, the various media will indicate whether or not they plan to attend. If T.V. representatives have indicated an interest in the conference, find out what facilities or special equipment they will require and ensure that they are available (e.g. pre-arranged interviews and space for same, mobile unit parking, advance set-up time).

Where possible, reserve a separate room for the use of media people exclusively which is staffed by a person qualified to discuss the aims and objectives of the conference planners and details of the program.

If material has not been forwarded in advance, have on hand additional copies of the conference program, a list of session chairmen and resource people, a map or directions indicating the location of the various sessions and passes to all conference activities, should they be required. All of this material can be provided in a kit along with a lapel card. In addition, a press room should have a few writing tables, one or more telephones and space where elaborate equipment can be left for safekeeping.

In many instances, it is not possible to have the press room adjacent to the registration desk and a press table is required at the door to provide information.

Where it is not possible to provide a press room, a special desk at the main door can fulfill many of the same functions.

As an added note, a great deal of inconvenience to both conference participants and media representatives can be avoided if seats for media people either on an aisle or near the door are reserved in all conference sessions including meals.

## **SETTING UP DISPLAYS**

Displays may include audio-visual presentations, information handouts, books and brochures for viewing or art work.

If planning a book display only, one may contact the Canadian Book Publishers Council who will notify the publishers in the area about the conference and advise the sponsor as to who will attend. However, for displays of any particular type of product, manufacturers must be contacted directly.

The invitation should include details such as the size and shape of space available to individual participants, existing electrical outlets, lighting and drapery, viewing hours and deadlines. When all arrangements have been made, a simple floor plan of the display area, indicating where each participant is to be located should be drawn up.

More elaborate displays involving film showings, multi-media experiences, etc., can prove costly unless one is successful in finding manufacturers who are willing to provide materials and set up the display as a form of publicity.

## **ARRANGING MEALS**

As soon as the location has been chosen, select menus for the various meals required.

If the accommodation selected does not provide catering services, commercial catering firms must be contacted. Beware of buffet style meals for conferences of more than 200 people as a minimum of two hours is required to serve a large number. A fixed menu enables staff to place a number of items on the table before the luncheon period and greatly speeds up the service of the main courses.

Luncheon prices will vary from \$2.00-\$6.00 per person while dinner prices may reach \$8.00-\$10.00 per person if provided by a profit-making organization. Where funds are extremely limited, one might look into the possibility of using church groups or women's service clubs as caterers. In most instances, bar facilities should be provided at the consumer's own personal expense.

When ordering food, one should consider such things as the combined attractiveness of the various items, whether or not it can be cooked ahead of time and kept warm, whether or not it is acceptable to all religious groups who will attend, its price in relation to your total budget, its general popularity (avoid unusually seasoned or rare foods) and, if buying directly, whether or not it is seasonal (e.g. fresh fruit desserts may cost more than \$1.00 per person in the winter months).

If arranging a small reception for 25 to 30 people, it is usually more economical to rent a room or suite at full cost and bring in one's own refreshments. If buying hors d'oeuvres or coffee for such a reception, it is recommended that you buy food by the platter and coffee by the urn rather than on a per capita basis.

## CONFERENCE EVALUATION

In drawing up a conference evaluation, one should consider the following:

- (1) degree to which the conference achieved initial goals
- (2) validity of initial goals and priorities.
- (3) reaction of guests to individual conference sessions and activities, and to the conference as a whole.
- (4) degree to which attitudes, values and/or commitments were changed by the conference itself.
- (5) suggestions from participants as to how the conference might have been improved.
- (6) suitability of accommodation and facilities.

It is often helpful to ask questions regarding issues and hopes for the conference both prior and subsequent to the conference to determine whether or not any significant changes in attitudes, values, or points of view have taken place.

If the conference was designed to promote individual or social action, make an effort to obtain some follow-up as to what immediate action followed the conference, and how long such action was sustained.



## THE CONFERENCE REPORT

One should attempt to produce and distribute the conference report before interest wanes. It is preferable to provide a reasonably simple report promptly than to spend months preparing a slick piece of printing and journalism. To expedite the production of the report, all persons making any kind of presentation should be asked to provide the sponsor with a reproducible draft just prior to the time of the conference. In addition, recorders of individual sessions ought to be given a deadline for submitting their reports.

By having large sections of the report written by program participants, production becomes a job of editing and composition rather than of writing. With this technique, there is less chance of misinterpreting or misrepresenting what has been said. If staff must be specially engaged to write a report, much time may be lost in getting the approval of the many resource people who have taken part in the conference.

In some instances, the planning committee may feel that they all should share in the production of the report. However, this arrangement is rarely successful as individuals will have different writing styles and different approaches. In the event that this desire is expressed, usually a few meetings will bring out the many problems involved in this arrangement. It is preferable to have all content approved by the planning committee while assigning one or two persons to write the material.

## A CHECK LIST FOR THE CO-ORDINATOR

This list is by no means all inclusive but can serve as a helpful guide to the novice in this field.

### A. Date, Time & Location

- (1) Does the date selected conflict with any major local event?
- (2) Is the time selected suitable for those with families, those who are employed, those from out-of-town, etc.?
- (3) Is there sufficient accommodation available for out-of-town guests?
- (4) Does the accommodation selected have such facilities as:
  - (a) overnight accommodation
  - (b) a theatre or blackout curtains for films

- (c) sufficient electrical outlets for equipment required
  - (d) catering services
  - (e) rooms for all small or large groups you intend to have
  - (f) accessibility for setting up and dismantling displays, etc., prior and subsequent to the conference
  - (g) a public address system
- (5) How much time will be lost in emptying rooms, moving people from one room to another etc.?
  - (6) Will people have difficulty finding their way around?
  - (7) Is there parking available and public transportation to accommodation at appropriate times?

## **B. Mailing Lists**

- (1) Have you all mailing lists in hand and all envelopes typed so that material can be sent out by the deadline you have set?
- (2) Have you covered all the interest groups who might attend?
- (3) Are you planning to restrict registration? If so, how will you determine who is to be invited?
- (4) Have you sent invitations and materials to special guests who may not be able to attend the entire conference?

## **C. Registration**

### **Pre-registration**

- (1) Does your form include a conference title which indicates the theme and tone of the conference; the location; the name, business address, home address and telephone numbers of participants; a return address so that it will be directed to the proper person; a list of facilities available (e.g. parking, babysitting); the registration fee, if any; to whom cheques or money orders should be made out; the registration deadline date; a general outline of the program and a list of sponsors.
- (2) Is your registration form being sent out early enough to allow time for its return and confirmation?
- (3) Do you have an alphabetical list of all those registered at the front desk in the event that some participants lose their admission cards, meal tickets, etc.?
- (4) Will you accept registrations at the door?
- (5) Have you any way of knowing the identity and number of those registered who actually arrive?



- (6) Is a dinner count required or are you paying for a minimum number? If accepting late registrations, is your estimated count adequate?
- (7) Are name tags already filled out? If not, have you considered what information you wish to have on them (e.g. name, organizations, locale or city, interest groups)?

### **Same-Day Registration**

- (1) Do you have sufficient staff to process the numbers anticipated in the time allowed for registration?
- (2) If accepting money, do you have sufficient change in your cash set-up and have you arranged for its safe-keeping when registration is closed?
- (3) Do you have registration forms, pencils, paper, programs, kits, etc., on hand?
- (4) Note 6 and 7 in the previous paragraph.

### **D. Speakers, Panels, Workshops, Etc.**

- (1) Have you given each speaker or resource person a detailed written outline of his duties and responsibilities, where he will be located, the time he is allotted, etc.?
- (2) Have you checked with all resource people as to whether they will require any special equipment? If so, have you arranged for it to be on hand?
- (3) Have you on hand drafts of all speeches and presentations to be given by resource people?
- (4) Are the rooms selected sufficiently large and adequately equipped for the particular group attending each session?

### **E. Administrative Staff**

- (1) Have you prepared a detailed list of all the duties of each staff member of the conference to avoid overlooking certain details while duplicating efforts in another area?
- (2) Have you given each staff member a list of not only his own duties, but those of all other staff members as well so that each person can give out information to participants should they have any questions?
- (3) Have you arranged a work schedule for staff allowing for coffee breaks, luncheon, etc.?

## **F. Meals and Coffee**

- (1) Have you allowed sufficient time in your program for meals and coffee breaks?
- (2) Will it be necessary to stagger groups for meals?
- (3) Do you plan to have a head table? If so, have you arranged for decorations, seating, microphones, etc.?
- (4) Have you made arrangements for a final dinner count to caterers?
- (5) Do you have staff to collect meal tickets?

## **G. The Day of the Conference**

- (1) Have you arranged to meet with all staff to ensure that everyone is on duty, is aware of his responsibilities, and has whatever equipment he requires on hand and in working order?
- (2) Are all conference functions clearly marked by signs, etc.?
- (3) If you have a large group in a theatre or auditorium, have you arranged to have them enter or exit by a number of doors if your day is tightly scheduled?
- (4) Have you arranged to have all sessions recorded? Tape recorders are of limited use for large groups where a number of people are speaking.
- (5) Will meals and coffee be served as scheduled?
- (6) Have you lists of the duties of all staff people in hand so that you can locate anyone you might need?

## **H. After the Conference**

- (1) Have you arranged for the removal of equipment, displays, etc.?
- (2) Have you received invoices and paid all staff people?
- (3) Have you drawn up some method of evaluating the conference?
- (4) Have you copies of all presentations, papers, speeches, etc., in hand for the conference report plus all tapes and scripts of session recorders?
- (5) Have you envelopes addressed for the mailing of the report?
- (6) Have you appointed a staff member to edit materials and write up the report? Do you wish to enclose an evaluation form?

## **I. Tips for the Co-ordinator**

- (1) Always prepare a detailed budget, plan of the day's activities and planning schedule or check list of your own duties.
- (2) Select a chairman who can abide by the schedule set out. If you plan to start at 9:00 a.m., for example, proceed even though all people may not be in their seats. By so doing, participants will realize that you plan to stay on schedule for the duration of the conference.
- (3) Make sure that the chairman has a detailed outline of the program in terms of time, staff, etc. Also provide him with a script indicating each time he is required to speak. Frequently, chairmen will overlook thank you's, acknowledgements, or announcements without such assistance.

## CONFERENCE PLANNING SCHEDULE

COMMUNITY

NAME OF CONFERENCE

### LOCAL CO-OPERATING ORGANIZATION

DATE AND TIME

## EXPLORATORY VISIT AND MEETINGS

## CONTACTS

DATE \_\_\_\_\_

## PRELIMINARY REPORT

DATE	IMMEDIATE SUPERVISOR	INTERMEDIATE SUPERVISOR	ULTIMATE SUPERVISOR
SUBMITTED			
APPROVED			

## PLANNING COMMITTEE SELECTED

[illegible]

## PLANNING COMMITTEE MEETINGS

.....

## CONFERENCE PLANNING SCHEDULE (Cont'd.)

MAILING LISTS		DATE TO BE SUBMITTED BY	
CONFERENCE STRUCTURE – PROGRAM OUTLINE			
SUGGESTIONS FOR CHAIRMAN AND KEY SPEAKER			
PREPARATION OF BUDGET			DATE
PROGRAM OUTLINE AND BUDGET SUBMITTED FOR APPROVAL		DATE SUBMITTED	DATE APPROVED
SPECIAL INVITATIONS			
DATE	NAME – POSITION	DATE REPLIED	Accepted Yes No
PRESS RELEASES			
DATE PREPARED	DATE SUBMITTED	DATE APPROVED	DATE RELEASED

# CONFERENCE PLANNING SCHEDULE (Cont'd.)

DISPLAYS		
LOCAL SLIDES – PICTURES		TO BE OBTAINED BY
TAPE RECORDER		
FILM		
PROJECTORS		
BULBS		
CORDS		
ORGANIZATION'S LITERATURE		
DATE SHIPPED	DATE RECEIVED	RECEIVED BY
PARTICIPATION OF OTHER ORGANIZATIONS IN DISPLAYS		
SPECIAL EQUIPMENT REQUIRED		
PROVIDED BY HOTEL OR HALL		
SHIPPED BY PLANNING GROUP		
SPECIAL SERVICES REQUIRED		
PRINTING – PROGRAM, REGISTRATION FORM, AND QUESTIONNAIRE		
COPY PREPARED AND SUBMITTED	COPY APPROVED	COPY SENT TO PRINTER
RECEIVED FROM PRINTER	DATE MAILED	NUMBER RETURNED

CONFERENCE PLANNING SCHEDULE (Cont'd.)

WORKSHOPS – SUBJECT AREA	GROUP LEADER	DATE FINALIZED

SUBMISSION OF SPEECHES OR RESOURCE MATERIAL

RESOURCE MATERIAL	SUBMITTED BY	DATE SUBMITTED

SPACE ACCOMMODATION

ROOMS AVAILABLE

ALLOCATION OF SPACE

ACCOMMODATION FOR OUT OF TOWN GUESTS

NO. AND TYPE OF ROOMS	DATE BOOKED

MEALS

LUNCHEON	TIME

COFFEE BREAKS	TIMES



[illegible][illegible][illegible]

DATE COMPLETED	DATE SUBMITTED FOR APPROVAL	DATE APPROVED
DATE TO PRINTER	DATE RECEIVED	DATE MAILED

**CONFERENCE PLANNING SCHEDULE (Cont'd.)**[illegible]

## NOTES

## NOTES

## NOTES









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# Conference Planning



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## INTRODUCTION

Every year, hotels, universities, private clubs, and community centres across North America open their doors to commercial enterprises, voluntary organizations, citizens groups, professional associations, and government departments for the purpose of holding a conference.

While some of these conferences may be deemed an outstanding success, many fall short of the goal set by sponsoring bodies, and often fail to meet the expectations of those who attend. Undoubtedly, much of this failure is due to inadequate planning.

In planning a conference, it is essential to define goals and priorities, identify and examine the potential audience, agree on a strategy, look at practical considerations (e.g. available financial and human resources, accommodation requirements, possible locations), and build in some means of assessing and evaluating what has been accomplished.

Over the past few decades, there appears to have been a commonly accepted assumption that conferences can solve almost any problem or fulfill any purpose. To some degree this may be true, but it must always be kept in mind that alternative courses of action may in many instances be considerably more appropriate than the conference format.

This manual is a collection of guidelines for those interested in participation and involvement within a conference setting. No attempt is made to suggest alternatives to holding a conference.

It is hoped that, by working through the suggestions below, organizations and individuals interested in holding a conference in the future will have a better understanding of the potential advantages and structural limits of this particular communicative medium.

### **Defining Goals and Priorities**

One may use a conference as a launching point for a program of action, as a learning process for participants, as a means of attracting publicity or arousing public interest around certain issues, or for many other purposes.

The following are some of the more common goals:

- (a) To convey specific information to a group of people
- (b) To stimulate a group of people to be more involved in a specific project or area of interest
- (c) To provide an opportunity for people who share common interests or experiences to meet and exchange ideas
- (d) To animate people to participate in community life regardless of their particular interests
- (e) To test an idea or hypothesis on a group of “informed” people
- (f) To test an idea or hypothesis on a random sample of people
- (g) To “sell” an idea or product
- (h) To improve inter-personal relationships and/or morale in a given setting

Frequently one’s goals will encompass a number of these and other factors. However, for the purposes of planning a conference it is important to be able to articulate these goals and list them in order of priority.

### **The Potential Audience**

Having defined the goals, it is then possible to identify a potential audience. At the outset, it is perhaps wise to ignore practical considerations and attempt to identify all those who ideally might attend. By so doing, it is much easier at a later date to set limitations on participation while maintaining the kind of representation one wants or needs.

The size and composition of the group will greatly affect the kind of structure needed to bring about maximum communication and involvement at the conference. In turn, both factors will determine accommodation needs.

Most of us are successful in reaching colleagues in our own profession, the perennial conference goer, or those who see their own interests clearly at stake. The ultimate question is how can one reach the so-called “inarticulate” groups or individuals in our society – those who do not participate, seem uninvolved, or appear uninterested.

A slight over-representation of such groups in the planning body is suggested as one means of involving them. Secondly, a larger portion of the publicity may be specifically directed towards them.

Having identified a potential audience, consider the following: Will they be free to attend? Are they part of the labour force? Are they within reasonable proximity to the suggested conference site? Do they speak the same language? Do they have access to the same information? Can they afford to pay transportation costs or a registration fee? Will day care present a problem for them? Do they follow religious or cultural traditions which may affect their participation or involvement (e.g. dietary laws, role limitations,)?

In view of these or other similar factors one should consider the advantages and/or disadvantages of holding a national, provincial, regional or community conference and the basic structure necessary to accommodate the special needs of the group.

### **Agreeing on Strategy**

To some community organizers, group leaders, and staff development people, the word 'strategy' smacks of manipulation, paternalism, or outright deceit.

However, where a group of people are involved in a planning process, agreement on strategy is of paramount importance. It is vital to establish a set of clearly stated ground rules designed to achieve the goals and accommodate the priorities already agreed upon by the group (e.g. persons, if any, to receive special consideration, budget priorities, the kind of representation desired in various sessions. Otherwise, for example, planning committee members may select program participants whom they support ideologically or professionally but who cannot provide the input necessary to achieve conference goals.)

It is important that one's strategy be sufficiently flexible to allow individuals involved in the planning the necessary freedom of action to organize, promote or co-ordinate a given aspect of the conference without compromising on overall goals.

### **Example**

In organizing a community conference which is to include representatives from all sectors of the community and focus on their relationship to the total community, individuals will require considerable freedom of action in terms of publicity, promotion, and structure of sessions, to successfully involve the many diverse groups. However, sessions focussing on the special concerns of one group (e.g. students, the poor, the single parent family), cannot exclude representatives of other groups if these problems are to be viewed in the context of the total community.

## **The Budget**

In drawing up a budget, the following factors must be considered:

- (1) Promotion and publicity
- (2) Accommodation and facilities
- (3) Speakers, panelists, group leaders, technicians, commissionaires, etc.
- (4) Meals and entertainment
- (5) Telephone calls, postage costs, etc.
- (6) Administrative and clerical assistance
- (7) Printing of programs, folders, reports, etc.
- (8) Supplies (e.g. paper, lapel cards, sound equipment, signs, display material)

It is vital to obtain estimates on major expenditures and, if estimated expenditures are in excess of available funds, one might consider the following:

- (1) Charging a registration fee
- (2) Soliciting voluntary donations
- (3) Recruiting volunteers to organize and staff the conference

If the conference is being sponsored by a voluntary agency, citizens' group, or other organization working with a limited budget, it may be desirable to conduct a fund raising campaign. Funds can often be obtained from private donors, industry, foundations, or government departments. In return for their financial assistance, most contributing bodies will expect to be included in the credits on printed material, asked to take part in the conference as speakers, or asked to provide some kind of display. Groups who are repeatedly going to the public for financial assistance are very conscious of the importance of giving their donors public recognition.

## **Human Resources Available**

Attempt to identify all those persons who can contribute to the planning or the activities of the conference. It is extremely important to include representatives of the various interest groups you hope to involve in the conference. All too frequently, conference planning is left to experts who have a wide variety of talents and skills but who cannot relate directly to some of the less articulate segments of the population.

In addition to representatives of various interest groups, consideration should be given to persons who have special technical, organizational, or group leadership skills, persons who can make



an academic contribution, public relations people, media representatives, and so on.

Do not overlook the possibility of utilizing many willing and competent non-professionals in the community. Where the assistance of professionals is available, attempt to utilize their contacts or special skills rather than involving them in a host of details which can be handled by community volunteers.

## **WHERE TO BEGIN**

It is essential to realize that one cannot plan and organize a conference alone. While it is possible to hire or appoint a professional or outside co-ordinator who may be highly skilled in the mechanics of organizing a conference, his role should not be confused with that of the planning committee.

The professional co-ordinator can be most effective only when a sponsor can provide:

- (1) A clear definition of conference goals.
- (2) An approved operating budget to purchase goods and services.
- (3) Some general guidelines, e.g. desired audience, possible dates, time allowed.

In most circumstances the role of the planning body is to make these kind of decisions.

In the majority of cases, groups do not have the resources at their disposal to hire a professional co-ordinator. Instead they select one of more members of the planning body to fulfil this role. In fact, this is in many ways a more desirable arrangement for groups interested in developing leadership skills.

## **HOW TO CHOOSE THE PLANNING COMMITTEE**

If a planning committee is to be effective, the number of members should be limited. In the case of very large conferences, it is preferable to set up a number of sub-committees to deal with specific aspects of the conference rather than having all of these people represented on the major planning body.

Members of this committee should have time, resources, and skills to contribute. In some instances, a person with a host of contacts or a person who has considerable status in the community may be

included to gain recognition and publicity for the conference. However, beware of overloading the planning body with such people unless they are prepared to do a considerable amount of work on your behalf. While a conference may be "successful" in the view of those who read the newspapers, it may completely fail to achieve your goals.

What kind of representation, then, should one strive for on the planning body?

- (1) Representatives of the various interest groups you hope to involve.
- (2) Persons who have either extensive knowledge and/or experience in the areas to be covered at the conference.
- (3) Persons who have strong organizational abilities.
- (4) Persons who have some knowledge or experience in promotion, public relations or other media fields.
- (5) Persons who have a knowledge and understanding of group dynamics.

For the majority of conferences, the planning committee need not exceed 10-12 persons. Where conferences are extremely large and complex in structure, professional assistance may be required.

### Example

If a conference were concerned with evaluating social welfare services, the central planning body might include:

- ( 1) a representative of the press, radio or TV
- ( 2) a poor person
- ( 3) an unemployed person
- ( 4) a recent immigrant
- ( 5) a senior citizen
- ( 6) a student or drop-out
- ( 7) a single parent
- ( 8) a representative of an educational institution
- ( 9) a representative from a government agency
- (10) a representative of a voluntary agency in the community
- (11) an amateur or detached worker
- (12) a business man

At first glance, such a committee appears to be overloaded with persons who may lack strong organizational skills. However, consumers of the services in question must have a strong voice in the planning activities to ensure that a comprehensive view of these services is presented at the conference. It is important to remember that the professionals involved have many more



resources at their disposal (e.g. clerical assistance, greater access to information, community support.) This means that they, as individuals, can exert a greater influence on total planning. In the planning committee suggested above, we have attempted to offset this bias.

Where one hopes to achieve any kind of social change, it is essential that representatives of the various power structures participate in the conference. However, this group alone should not be responsible for the planning.

## **CHOOSING THE CO-ORDINATOR**

Assuming that one is not hiring a professional co-ordinator, one would look for a person with strong organizational skills and the ability to work with – and give direction to – a very heterogeneous group of people. He should be well informed about the issues at hand, but need not be a specialist in these areas. His most important function is to ensure that those involved in the planning process are able to work together on strategy and meet work deadlines. His role and lines of authority should be clearly defined as it is virtually impossible to function in this capacity without considerable freedom of action.

## **PLANNING COMMITTEE MEETINGS**

So long as the activities of the planning committee are co-ordinated and in line with strategy, the frequency, composition and agenda of individual meetings should be kept as flexible as possible to accommodate the individual needs of committee members.

If possible, at one of the first meetings the co-ordinator should present an all-inclusive statement on goals, projected expenditures and conference structure. A concrete presentation helps to focus the attention of a newly formed committee on the issues at hand and can eliminate much fruitless discussion. Committee members can question the validity and/or feasibility of his presentation, and alter or add to it where necessary or desirable.

Early in the planning stages, goals should be clearly defined, the potential audience examined, and a strategy agreed upon.

Once planning is well underway, it is seldom advisable to accept new members on the central planning body. Such changes often

result in a change of focus and a resulting shift in strategy. At best they tend to retard the progress of the committee as a group.

It is very important that the co-ordinator acquire a commitment from his planning committee at the outset and provide an opportunity for their **immediate** participation in some aspect of the conference planning. Responsibilities may be divided among committee members by organizational function or sectors of the audience.

There is no simple formula for determining the length of time required to plan a given conference.

For large, complex conferences, planning and organization can take up to a full year. However, planning time should not be excessive as the interest of committee members tends to wane.

## **CHOOSING A CONFERENCE THEME**

The most important factor in choosing a conference theme is to ensure that **all** of your potential audience can identify with it.

If you are hoping to attract one professional group, a theme which focuses on some particular aspect of their work might be appropriate.

However, when organizing a community conference, it is preferable to select a theme which conveys the importance of and need for participation and involvement in community life. It should also convey how each individual can be involved in the conference.

## **PUBLICITY AND PROMOTION**

Assuming one has a limited budget, what means can be used to publicize or promote a conference?

- (1) **Letters to local newspapers or magazine editors** arousing interest in your areas of concern prior to the conference.
- (2) **Press releases** to the editors of local press informing them about your conference.
- (3) **Radio or TV announcements.** Many radio and TV stations will provide air time as a public service, particularly if the conference is of general interest to the whole community.
- (4) **Posters or signs** in public places.

(5) **Brochures, pamphlets, registration forms, etc.**

Although an attractive brochure can be a very effective means of publicizing and promoting a conference, printing costs should be given careful consideration. Frequently, groups produce "slick" folders and brochures while economizing on activities and materials which can make the conference more exciting and meaningful to those who attend. Also, if the conference is being financed by government or from voluntary donations, very slick brochures may be considered a waste of conference funds because of their temporary nature. A reasonably simple folder can serve the needs of most groups, if the theme selected is appropriate and the information provided explicit.

Registration forms should always include the time, location, registration fee (if any), and rough outline of the program. If the form is not pre-addressed, a return address must also be included.

Those with limited funds might use amateur artists and printers enrolled in vocational schools or community colleges to reduce printing costs. Work might also be done by centres for the handicapped. If planning to use a professional printer, it is preferable to give your contract to businessmen in the community where you wish to hold the conference.

## **SELECTING A DATE AND TIME**

Conferences for professional groups are usually held within business hours during the slackest period of the year for the particular group. However, community conferences must be scheduled outside business hours to allow working people to attend. The summer months prove unsatisfactory since a large number of people are away from home on weekends and vacation periods.

The length of the conference must be determined on the basis of content, the structure of the program, and the possibility of participants attending for any given period.

## **SELECTING ACCOMMODATION**

In selecting accommodation for a conference, consider the following:

- ( 1) Will guests require overnight accommodation? If so, is it available at the same location or in the immediate vicinity? Will all guests be able to stay in one place? Is the cost of overnight accommodation prohibitive for the non-subsidized guest?
- ( 2) The need for a registration area if guests have not been pre-registered.
- ( 3) The size of your potential audience if you have not pre-registered.
- ( 4) The availability of facilities such as sound systems, electrical outlets, black-out curtains, air-conditioning, auditoria.
- ( 5) Size and type of rooms available.
- ( 6) Parking and/or connections with public transportation.
- ( 7) What meals and social activities can be provided on the premises or in the immediate vicinity?
- ( 8) Access to the building prior and subsequent to the conference.
- ( 9) Building regulations re smoking, posting bills, serving of food and beverages, etc.
- (10) Display areas.
- (11) Proximity to social activities in the city.
- (12) Total cost of accommodation.

## REGISTRATION

Particularly if the conference is a large one, at least three weeks is required to finalize arrangements for meals, workshops and the allocation of accommodation for individual activities.

In planning either a one day or a very large conference, it is preferable to either pre-register guests by mail or on the evening prior to the conference program. If sufficient funds are available, hosting an informal reception after the evening registration is one effective means of allowing participants to meet and exchange ideas prior to the conference itself.

If pre-registering, program registration forms should be mailed out six weeks before the conference allowing participants about three weeks to return them.

Considerable time can be saved if receipts, lapel cards, meal tickets, admission cards for individual sessions, etc., can be mailed out to those registered prior to the conference. If the group is a very mixed one, it is also desirable to send out any information or reading materials at this time.



Whether or not participants are pre-registered, a small registration desk is required with alphabetical lists of all those registered and the sessions to which they have been allocated, as some participants are certain to misplace their tickets or other information. In addition, one may plan to hand out kits or resource material at the conference itself.

One relatively simple way of recording registrations and session choices is by using a wall chart like the following. (Each session should have the same number of squares per line to simplify reading.)

SESSION							MEAL		
1	2	3	4	5	6		1	2	3

As each person registers, an x or  $\checkmark$  is marked under each session to which he is allocated and under each meal he will require. When registration is closed, it is relatively simple to select the accommodation for each session on the basis of numbers enrolled and the facilities required.

If, on the other hand, one wishes to have sessions of the same or limited size, persons can be assigned to similar or related sessions where one is over-subscribed or, a second session in the same subject area can be set up.

If all participants are allocated to the sessions of their choice, such a chart is very helpful in planning future conferences as a graphic illustration of the general areas of interest of those who are likely to attend.

For smaller conferences, with no meals provided or where meal tickets can be sold at the opening of the conference, registration may be carried out the morning of the program. However, for a conference of more than 100 people, it is not advisable to attempt to register the first day of the conference.

To set up a registration desk, registration cards should be set out with pencils so that participants can pick them up and fill them in

themselves. It is advisable to request that registrations be printed as some handwriting is illegible. The main registration desk can then be divided into alphabetical sections (e.g. A-E, F-L, M-Q, R-Z), the range of each unit varying with the numbers expected.

If money is to be exchanged, someone should be delegated to set up and receive the cash for each section, check cash received against the number registered in each section, and deposit funds either with the hotel or in a bank.

Lapel cards must be typed or handwritten, receipts filled out, and resource material or kits handed out.

Again, depending on the size of the conference, all of these duties may be performed by one registration person, or work may be divided among cashiers, registration clerks, and information staff.

## **SIGNS AND DIRECTIONS**

Conference planners often become so familiar with the conference site that they tend to overlook the need for signs and directions.

If one is using a very large building with an unusual floor plan or if activities are spread out throughout the building, it is sometimes advisable to provide participants with a floor plan indicating individual activities and facilities. In addition, large, colourful or striking signs should be posted in all places where persons might go in alternant directions. In a hotel, many of these signs will be provided. However, in schools and community halls, the responsibility for making and posting signs rests with the conference organizers. One may find, too, that the building selected has special regulations regarding the kinds of signs which may be posted and the kinds of adhesives or staples used.

At all times, at least one person should be on the registration desk to provide information and directions to those who have lost their way.

If finances permit or if volunteers are available, guides can be very helpful in large centres such as universities, community colleges and huge civic buildings.

## CONFERENCE STRUCTURE

The way in which activities are structured is perhaps the most important factor in determining the kinds of learning, interaction, involvement and commitment which will result from your efforts.

What can be done, then, to animate, stimulate or educate a group of people?

Consider the various activities and experiences a conference might include and the primary function they serve.

### Activity

Speech or Lecture

Group Interview

Symposium

Forum

Panel

Debate

Film

Demonstration

Tour or field trip

Film

Display or Exhibit

Multi-Media Environmental

Experiences

Experiential Training Session

Brainstorming

Buzz Groups

Workshops or Seminars

Question and Answer Sessions

Under Fire Panels

T. Groups

Discussion Groups

Meals

Social Activities

Evaluations

Polls

Surveys

### Primary Function

To convey a specific message or ensure that all in attendance have a minimum of information about the issues at hand.

To provide an opportunity for learning through direct involvement or experience.

To provide an opportunity for dialogue and feedback.

To provide an opportunity for participants to meet and exchange ideas on a very informal level.

To provide an opportunity for participants to express their views on the issues discussed and on the conference in general.



Certainly structure alone cannot make a conference effective. Your success in attracting the group you hope to reach, the quality of speakers, resource people, films, displays, etc., will also be major factors. However, "good" people can be highly ineffective if structure is not given careful consideration.

We must then:

- (1) Convey information
- (2) Create an environment that is conducive to good communication and learning
- (3) Provide opportunities for the immediate involvement and participation of those in attendance
- (4) Promote dialogue
- (5) Provide an opportunity for guests to evaluate the conference

In order to arrive at concrete decisions at a larger conference, it is essential that the group be broken up into smaller units.

Again depending on your aims, small groups may assemble voluntarily, the group may be evenly divided alphabetically, numerically, by age, by sex, or by interest, or the planning body may choose to arbitrarily assign participants to individual groups to ensure the broadest possible representation in each.

## **SELECTING SPEAKERS, PANELISTS, FILMS, DISPLAYS or MULTI-MEDIA PRESENTATIONS**

If the central feature of the program is to be a speaker or panel, one needs people who are dynamic, controversial, and well informed. An equally important factor is their ability to relate to the group on its own terms. Participants should be able to relate to the resource people as well as the issues.

At a community conference, resource people should be chosen from all socio-economic and educational levels.

Ask those selected to submit an outline of what they propose to say or do prior to the conference. Such submissions give the sponsor a better idea of what will be covered and secondly, provide him with a framework for the conference report.

Films may focus on a single point of view, present a variety of points of view and experiences while drawing no conclusions, or present a number of alternatives while strongly supporting one of them. The N.F.B.'s **Alinsky** series or the A.F.B.'s **Ghetto** for

example are effective since they evoke a highly individual response on the part of the viewer. A film which presents objective, yet general views on issues such as poverty, teacher training, community development, etc., often requires supporting activities to generate dialogue. Films selected or produced should be in hand at least two weeks prior to the conference for previewing.

Slides, film strips, film sound tracks, samples of natural and man-made products and other visual aids can be used very successfully to convey information through direct experience. If the content is familiar to the group, people may selectively perceive those things of which they are already aware. To avoid this, it is preferable to present familiar but unrelated sounds, smells and images simultaneously to alter one's normal perception of things. Tours and/or displays can also be used to convey information.

## **SELECTING DIALOGUE ACTIVITIES**

Large meetings or question and answer sessions can be very effective when the issues at hand can be clearly defined or identified. However, for more general areas of concern, a few speakers may dominate the session while the majority neither participate nor involve themselves in the discussion.

In dealing with issues where the response is likely to be highly individual, small workshops, sensitivity groups, or under attack panels provide greater opportunity for individual expression.

Any conference which brings together many people who are not acquainted with one another should include some kind of informal social gathering.

## **CHOOSING SESSION RECORDERS**

If a session has only one or two speakers at the front of the room, the most effective way of recording it is on tape. However, for workshops and seminars, taping is not always adequate or even desirable. If the volume is set sufficiently high to pick up all the voices in the room, it will also pick up coughs, feet shuffling and whispering. Such tapes are virtually impossible to transcribe and the cost of transcription can be staggering.

If the content of the session must be recorded verbatim, one should use a secretarial team, as relatively few secretaries can take shorthand for a full hour with no break. If, on the other hand, one requires only a general or point form report on proceedings, one person who is relatively knowledgeable in the field can fulfill this role. If a group does not have the resources to hire secretaries or rent tape recorders, one might consider hiring students in business courses or recruiting volunteers.

Reports on all sessions ought to be submitted to the sponsor by, at the latest, a week after the conference.

## **PROVIDING FACILITIES FOR THE MEDIA**

In order to obtain the best possible coverage in the communications media, it is advisable to notify the press and local radio and T.V. stations of the event approximately two months in advance. Follow up this notification with a press release giving as many pertinent details as possible about two weeks before the conference and a 'phone call perhaps three days beforehand as a reminder. In most cases, the various media will indicate whether or not they plan to attend. If T.V. representatives have indicated an interest in the conference, find out what facilities or special equipment they will require and ensure that they are available (e.g. pre-arranged interviews and space for same, mobile unit parking, advance set-up time).

Where possible, reserve a separate room for the use of media people exclusively which is staffed by a person qualified to discuss the aims and objectives of the conference planners and details of the program.

If material has not been forwarded in advance, have on hand additional copies of the conference program, a list of session chairmen and resource people, a map or directions indicating the location of the various sessions and passes to all conference activities, should they be required. All of this material can be provided in a kit along with a lapel card. In addition, a press room should have a few writing tables, one or more telephones and space where elaborate equipment can be left for safekeeping.

In many instances, it is not possible to have the press room adjacent to the registration desk and a press table is required at the door to provide information.

Where it is not possible to provide a press room, a special desk at the main door can fulfill many of the same functions.

As an added note, a great deal of inconvenience to both conference participants and media representatives can be avoided if seats for media people either on an aisle or near the door are reserved in all conference sessions including meals.

## **SETTING UP DISPLAYS**

Displays may include audio-visual presentations, information handouts, books and brochures for viewing or art work.

If planning a book display only, one may contact the Canadian Book Publishers Council who will notify the publishers in the area about the conference and advise the sponsor as to who will attend. However, for displays of any particular type of product, manufacturers must be contacted directly.

The invitation should include details such as the size and shape of space available to individual participants, existing electrical outlets, lighting and drapery, viewing hours and deadlines. When all arrangements have been made, a simple floor plan of the display area, indicating where each participant is to be located should be drawn up.

More elaborate displays involving film showings, multi-media experiences, etc., can prove costly unless one is successful in finding manufacturers who are willing to provide materials and set up the display as a form of publicity.

## **ARRANGING MEALS**

As soon as the location has been chosen, select menus for the various meals required.

If the accommodation selected does not provide catering services, commercial catering firms must be contacted. Beware of buffet style meals for conferences of more than 200 people as a minimum of two hours is required to serve a large number. A fixed menu enables staff to place a number of items on the table before the luncheon period and greatly speeds up the service of the main courses.



Luncheon prices will vary from \$2.00-\$6.00 per person while dinner prices may reach \$8.00-\$10.00 per person if provided by a profit-making organization. Where funds are extremely limited, one might look into the possibility of using church groups or women's service clubs as caterers. In most instances, bar facilities should be provided at the consumer's own personal expense.

When ordering food, one should consider such things as the combined attractiveness of the various items, whether or not it can be cooked ahead of time and kept warm, whether or not it is acceptable to all religious groups who will attend, its price in relation to your total budget, its general popularity (avoid unusually seasoned or rare foods) and, if buying directly, whether or not it is seasonal (e.g. fresh fruit desserts may cost more than \$1.00 per person in the winter months).

If arranging a small reception for 25 to 30 people, it is usually more economical to rent a room or suite at full cost and bring in one's own refreshments. If buying hors d'oeuvres or coffee for such a reception, it is recommended that you buy food by the platter and coffee by the urn rather than on a per capita basis.

## CONFERENCE EVALUATION

In drawing up a conference evaluation, one should consider the following:

- (1) degree to which the conference achieved initial goals
- (2) validity of initial goals and priorities.
- (3) reaction of guests to individual conference sessions and activities, and to the conference as a whole.
- (4) degree to which attitudes, values and/or commitments were changed by the conference itself.
- (5) suggestions from participants as to how the conference might have been improved.
- (6) suitability of accommodation and facilities.

It is often helpful to ask questions regarding issues and hopes for the conference both prior and subsequent to the conference to determine whether or not any significant changes in attitudes, values, or points of view have taken place:

If the conference was designed to promote individual or social action, make an effort to obtain some follow-up as to what immediate action followed the conference, and how long such action was sustained.

## THE CONFERENCE REPORT

One should attempt to produce and distribute the conference report before interest wanes. It is preferable to provide a reasonably simple report promptly than to spend months preparing a slick piece of printing and journalism. To expedite the production of the report, all persons making any kind of presentation should be asked to provide the sponsor with a reproducible draft just prior to the time of the conference. In addition, recorders of individual sessions ought to be given a deadline for submitting their reports.

By having large sections of the report written by program participants, production becomes a job of editing and composition rather than of writing. With this technique, there is less chance of misinterpreting or misrepresenting what has been said. If staff must be specially engaged to write a report, much time may be lost in getting the approval of the many resource people who have taken part in the conference.

In some instances, the planning committee may feel that they all should share in the production of the report. However, this arrangement is rarely successful as individuals will have different writing styles and different approaches. In the event that this desire is expressed, usually a few meetings will bring out the many problems involved in this arrangement. It is preferable to have all content approved by the planning committee while assigning one or two persons to write the material.

## A CHECK LIST FOR THE CO-ORDINATOR

This list is by no means all inclusive but can serve as a helpful guide to the novice in this field.

### A. Date, Time & Location

- (1) Does the date selected conflict with any major local event?
- (2) Is the time selected suitable for those with families, those who are employed, those from out-of-town, etc.?
- (3) Is there sufficient accommodation available for out-of-town guests?
- (4) Does the accommodation selected have such facilities as:
  - (a) overnight accommodation
  - (b) a theatre or blackout curtains for films

- (c) sufficient electrical outlets for equipment required
  - (d) catering services
  - (e) rooms for all small or large groups you intend to have
  - (f) accessibility for setting up and dismantling displays, etc., prior and subsequent to the conference
  - (g) a public address system
- (5) How much time will be lost in emptying rooms, moving people from one room to another etc.?
  - (6) Will people have difficulty finding their way around?
  - (7) Is there parking available and public transportation to accommodation at appropriate times?

## **B. Mailing Lists**

- (1) Have you all mailing lists in hand and all envelopes typed so that material can be sent out by the deadline you have set?
- (2) Have you covered all the interest groups who might attend?
- (3) Are you planning to restrict registration? If so, how will you determine who is to be invited?
- (4) Have you sent invitations and materials to special guests who may not be able to attend the entire conference?

## **C. Registration**

### **Pre-registration**

- (1) Does your form include a conference title which indicates the theme and tone of the conference; the location; the name, business address, home address and telephone numbers of participants; a return address so that it will be directed to the proper person; a list of facilities available (e.g. parking, babysitting); the registration fee, if any; to whom cheques or money orders should be made out; the registration deadline date; a general outline of the program and a list of sponsors.
- (2) Is your registration form being sent out early enough to allow time for its return and confirmation?
- (3) Do you have an alphabetical list of all those registered at the front desk in the event that some participants lose their admission cards, meal tickets, etc.?
- (4) Will you accept registrations at the door?
- (5) Have you any way of knowing the identity and number of those registered who actually arrive?



- (6) Is a dinner count required or are you paying for a minimum number? If accepting late registrations, is your estimated count adequate?
- (7) Are name tags already filled out? If not, have you considered what information you wish to have on them (e.g. name, organizations, locale or city, interest groups)?

### **Same-Day Registration**

- (1) Do you have sufficient staff to process the numbers anticipated in the time allowed for registration?
- (2) If accepting money, do you have sufficient change in your cash set-up and have you arranged for its safe-keeping when registration is closed?
- (3) Do you have registration forms, pencils, paper, programs, kits, etc., on hand?
- (4) Note 6 and 7 in the previous paragraph.

### **D. Speakers, Panels, Workshops, Etc.**

- (1) Have you given each speaker or resource person a detailed written outline of his duties and responsibilities, where he will be located, the time he is allotted, etc.?
- (2) Have you checked with all resource people as to whether they will require any special equipment? If so, have you arranged for it to be on hand?
- (3) Have you on hand drafts of all speeches and presentations to be given by resource people?
- (4) Are the rooms selected sufficiently large and adequately equipped for the particular group attending each session?

### **E. Administrative Staff**

- (1) Have you prepared a detailed list of all the duties of each staff member of the conference to avoid overlooking certain details while duplicating efforts in another area?
- (2) Have you given each staff member a list of not only his own duties, but those of all other staff members as well so that each person can give out information to participants should they have any questions?
- (3) Have you arranged a work schedule for staff allowing for coffee breaks, luncheon, etc.?

## **F. Meals and Coffee**

- (1) Have you allowed sufficient time in your program for meals and coffee breaks?
- (2) Will it be necessary to stagger groups for meals?
- (3) Do you plan to have a head table? If so, have you arranged for decorations, seating, microphones, etc.?
- (4) Have you made arrangements for a final dinner count to caterers?
- (5) Do you have staff to collect meal tickets?

## **G. The Day of the Conference**

- (1) Have you arranged to meet with all staff to ensure that everyone is on duty, is aware of his responsibilities, and has whatever equipment he requires on hand and in working order?
- (2) Are all conference functions clearly marked by signs, etc.?
- (3) If you have a large group in a theatre or auditorium, have you arranged to have them enter or exit by a number of doors if your day is tightly scheduled?
- (4) Have you arranged to have all sessions recorded? Tape recorders are of limited use for large groups where a number of people are speaking.
- (5) Will meals and coffee be served as scheduled?
- (6) Have you lists of the duties of all staff people in hand so that you can locate anyone you might need?

## **H. After the Conference**

- (1) Have you arranged for the removal of equipment, displays, etc.?
- (2) Have you received invoices and paid all staff people?
- (3) Have you drawn up some method of evaluating the conference?
- (4) Have you copies of all presentations, papers, speeches, etc., in hand for the conference report plus all tapes and scripts of session recorders?
- (5) Have you envelopes addressed for the mailing of the report?
- (6) Have you appointed a staff member to edit materials and write up the report? Do you wish to enclose an evaluation form?

## **I. Tips for the Co-ordinator**

- (1) Always prepare a detailed budget, plan of the day's activities and planning schedule or check list of your own duties.
- (2) Select a chairman who can abide by the schedule set out. If you plan to start at 9:00 a.m., for example, proceed even though all people may not be in their seats. By so doing, participants will realize that you plan to stay on schedule for the duration of the conference.
- (3) Make sure that the chairman has a detailed outline of the program in terms of time, staff, etc. Also provide him with a script indicating each time he is required to speak. Frequently, chairmen will overlook thank you's, acknowledgements, or announcements without such assistance.

CONFERENCE PLANNING SCHEDULE

COMMUNITY

NAME OF CONFERENCE
LOCAL CO-OPERATING ORGANIZATION
DATE AND TIME

EXPLORATORY VISIT AND MEETINGS	
CONTACTS	DATE

PRELIMINARY REPORT			
DATE	IMMEDIATE SUPERVISOR	INTERMEDIATE SUPERVISOR	ULTIMATE SUPERVISOR
SUBMITTED			
APPROVED			

PLANNING COMMITTEE SELECTED		
NAME	ORGANIZATION – ADDRESS	PHONE NO.

PLANNING COMMITTEE MEETINGS

CONFERENCE PLANNING SCHEDULE (Cont'd.)

MAILING LISTS		DATE TO BE SUBMITTED BY
CONFERENCE STRUCTURE – PROGRAM OUTLINE		
SUGGESTIONS FOR CHAIRMAN AND KEY SPEAKER		
PREPARATION OF BUDGET		DATE
PROGRAM OUTLINE AND BUDGET SUBMITTED FOR APPROVAL		DATE SUBMITTED
		DATE APPROVED

SPECIAL INVITATIONS

DATE	NAME – POSITION	DATE REPLIED	Accepted	
			Yes	No

PRESS RELEASES

DATE PREPARED	DATE SUBMITTED	DATE APPROVED	DATE RELEASED
1			
2			
3			

# CONFERENCE PLANNING SCHEDULE (Cont'd.)

DISPLAYS		
LOCAL SLIDES – PICTURES		TO BE OBTAINED BY
TAPE RECORDER		
FILM		
PROJECTORS		
BULBS		
CORDS		
ORGANIZATION'S LITERATURE		
DATE SHIPPED	DATE RECEIVED	RECEIVED BY
PARTICIPATION OF OTHER ORGANIZATIONS IN DISPLAYS		
SPECIAL EQUIPMENT REQUIRED		
PROVIDED BY HOTEL OR HALL		
SHIPPED BY PLANNING GROUP		
SPECIAL SERVICES REQUIRED		
PRINTING – PROGRAM, REGISTRATION FORM, AND QUESTIONNAIRE		
COPY PREPARED AND SUBMITTED	COPY APPROVED	COPY SENT TO PRINTER
RECEIVED FROM PRINTER	DATE MAILED	NUMBER RETURNED



CONFERENCE PLANNING SCHEDULE (Cont'd.)

WORKSHOPS – SUBJECT AREA	GROUP LEADER	DATE FINALIZED

SUBMISSION OF SPEECHES OR RESOURCE MATERIAL

RESOURCE MATERIAL	SUBMITTED BY	DATE SUBMITTED

SPACE ACCOMMODATION

ROOMS AVAILABLE
ALLOCATION OF SPACE

ACCOMMODATION FOR OUT OF TOWN GUESTS

NO. AND TYPE OF ROOMS	DATE BOOKED

MEALS

LUNCHEON	TIME
COFFEE BREAKS	TIMES



[illegible][illegible][illegible]

DATE COMPLETED	DATE SUBMITTED FOR APPROVAL	DATE APPROVED
DATE TO PRINTER	DATE RECEIVED	DATE MAILED

**CONFERENCE PLANNING SCHEDULE (Cont'd.)**[illegible]

## NOTES

## NOTES

## NOTES









Ontario Ministry  
of Citizenship  
and Culture

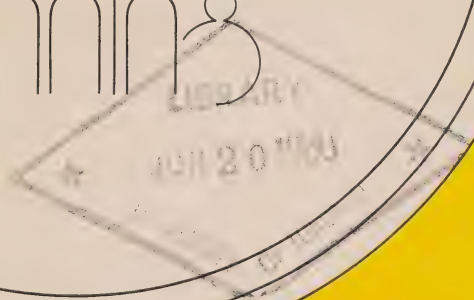
Multiculturalism  
and Citizenship  
Division

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Minister  
Ward Cornell  
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# Conference Planning



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CONFERENCE  
PLANNING

# Conference Planning



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## INTRODUCTION

Every year, hotels, universities, private clubs, and community centres across North America open their doors to commercial enterprises, voluntary organizations, citizens groups, professional associations, and government departments for the purpose of holding a conference.

While some of these conferences may be deemed an outstanding success, many fall short of the goal set by sponsoring bodies, and often fail to meet the expectations of those who attend. Undoubtedly, much of this failure is due to inadequate planning.

In planning a conference, it is essential to define goals and priorities, identify and examine the potential audience, agree on a strategy, look at practical considerations (e.g. available financial and human resources, accommodation requirements, possible locations), and build in some means of assessing and evaluating what has been accomplished.

Over the past few decades, there appears to have been a commonly accepted assumption that conferences can solve almost any problem or fulfill any purpose. To some degree this may be true, but it must always be kept in mind that alternative courses of action may in many instances be considerably more appropriate than the conference format.

This manual is a collection of guidelines for those interested in participation and involvement within a conference setting. No attempt is made to suggest alternatives to holding a conference.

It is hoped that, by working through the suggestions below, organizations and individuals interested in holding a conference in the future will have a better understanding of the potential advantages and structural limits of this particular communicative medium.

### **Defining Goals and Priorities**

One may use a conference as a launching point for a program of action, as a learning process for participants, as a means of attracting publicity or arousing public interest around certain issues, or for many other purposes.

The following are some of the more common goals:

- (a) To convey specific information to a group of people
- (b) To stimulate a group of people to be more involved in a specific project or area of interest
- (c) To provide an opportunity for people who share common interests or experiences to meet and exchange ideas
- (d) To animate people to participate in community life regardless of their particular interests
- (e) To test an idea or hypothesis on a group of "informed" people
- (f) To test an idea or hypothesis on a random sample of people
- (g) To "sell" an idea or product
- (h) To improve inter-personal relationships and/or morale in a given setting

Frequently one's goals will encompass a number of these and other factors. However, for the purposes of planning a conference it is important to be able to articulate these goals and list them in order of priority.

### **The Potential Audience**

Having defined the goals, it is then possible to identify a potential audience. At the outset, it is perhaps wise to ignore practical considerations and attempt to identify all those who ideally might attend. By so doing, it is much easier at a later date to set limitations on participation while maintaining the kind of representation one wants or needs.

The size and composition of the group will greatly affect the kind of structure needed to bring about maximum communication and involvement at the conference. In turn, both factors will determine accommodation needs.

Most of us are successful in reaching colleagues in our own profession, the perennial conference goer, or those who see their own interests clearly at stake. The ultimate question is how can one reach the so-called "inarticulate" groups or individuals in our society - those who do not participate, seem uninvolved, or appear uninterested.

A slight over-representation of such groups in the planning body is suggested as one means of involving them. Secondly, a larger portion of the publicity may be specifically directed towards them.

Having identified a potential audience, consider the following: Will they be free to attend? Are they part of the labour force? Are they within reasonable proximity to the suggested conference site? Do they speak the same language? Do they have access to the same information? Can they afford to pay transportation costs or a registration fee? Will day care present a problem for them? Do they follow religious or cultural traditions which may affect their participation or involvement (e.g. dietary laws, role limitations.)?

In view of these or other similar factors one should consider the advantages and/or disadvantages of holding a national, provincial, regional or community conference and the basic structure necessary to accommodate the special needs of the group.

### **Agreeing on Strategy**

To some community organizers, group leaders, and staff development people, the word 'strategy' smacks of manipulation, paternalism, or outright deceit.

However, where a group of people are involved in a planning process, agreement on strategy is of paramount importance. It is vital to establish a set of clearly stated ground rules designed to achieve the goals and accommodate the priorities already agreed upon by the group (e.g. persons, if any, to receive special consideration, budget priorities, the kind of representation desired in various sessions. Otherwise, for example, planning committee members may select program participants whom they support ideologically or professionally but who cannot provide the input necessary to achieve conference goals.)

It is important that one's strategy be sufficiently flexible to allow individuals involved in the planning the necessary freedom of action to organize, promote or co-ordinate a given aspect of the conference without compromising on overall goals.

### **Example**

In organizing a community conference which is to include representatives from all sectors of the community and focus on their relationship to the total community, individuals will require considerable freedom of action in terms of publicity, promotion, and structure of sessions, to successfully involve the many diverse groups. However, sessions focussing on the special concerns of one group (e.g. students, the poor, the single parent family), cannot exclude representatives of other groups if these problems are to be viewed in the context of the total community.

## **The Budget**

In drawing up a budget, the following factors must be considered:

- (1) Promotion and publicity
- (2) Accommodation and facilities
- (3) Speakers, panelists, group leaders, technicians, commissionaires, etc.
- (4) Meals and entertainment
- (5) Telephone calls, postage costs, etc.
- (6) Administrative and clerical assistance
- (7) Printing of programs, folders, reports, etc.
- (8) Supplies (e.g. paper, lapel cards, sound equipment, signs, display material)

It is vital to obtain estimates on major expenditures and, if estimated expenditures are in excess of available funds, one might consider the following:

- (1) Charging a registration fee
- (2) Soliciting voluntary donations
- (3) Recruiting volunteers to organize and staff the conference

If the conference is being sponsored by a voluntary agency, citizens' group, or other organization working with a limited budget, it may be desirable to conduct a fund raising campaign. Funds can often be obtained from private donors, industry, foundations, or government departments. In return for their financial assistance, most contributing bodies will expect to be included in the credits on printed material, asked to take part in the conference as speakers, or asked to provide some kind of display. Groups who are repeatedly going to the public for financial assistance are very conscious of the importance of giving their donors public recognition.

## **Human Resources Available**

Attempt to identify all those persons who can contribute to the planning or the activities of the conference. It is extremely important to include representatives of the various interest groups you hope to involve in the conference. All too frequently, conference planning is left to experts who have a wide variety of talents and skills but who cannot relate directly to some of the less articulate segments of the population.

In addition to representatives of various interest groups, consideration should be given to persons who have special technical, organizational, or group leadership skills, persons who can make



an academic contribution, public relations people, media representatives, and so on.

Do not overlook the possibility of utilizing many willing and competent non-professionals in the community. Where the assistance of professionals is available, attempt to utilize their contacts or special skills rather than involving them in a host of details which can be handled by community volunteers.

## **WHERE TO BEGIN**

It is essential to realize that one cannot plan and organize a conference alone. While it is possible to hire or appoint a professional or outside co-ordinator who may be highly skilled in the mechanics of organizing a conference, his role should not be confused with that of the planning committee.

The professional co-ordinator can be most effective only when a sponsor can provide:

- (1) A clear definition of conference goals.
- (2) An approved operating budget to purchase goods and services.
- (3) Some general guidelines, e.g. desired audience, possible dates, time allowed.

In most circumstances the role of the planning body is to make these kind of decisions.

In the majority of cases, groups do not have the resources at their disposal to hire a professional co-ordinator. Instead they select one of more members of the planning body to fulfil this role. In fact, this is in many ways a more desirable arrangement for groups interested in developing leadership skills.

## **HOW TO CHOOSE THE PLANNING COMMITTEE**

If a planning committee is to be effective, the number of members should be limited. In the case of very large conferences, it is preferable to set up a number of sub-committees to deal with specific aspects of the conference rather than having all of these people represented on the major planning body.

Members of this committee should have time, resources, and skills to contribute. In some instances, a person with a host of contacts or a person who has considerable status in the community may be



included to gain recognition and publicity for the conference. However, beware of overloading the planning body with such people unless they are prepared to do a considerable amount of work on your behalf. While a conference may be "successful" in the view of those who read the newspapers, it may completely fail to achieve your goals.

What kind of representation, then, should one strive for on the planning body?

- (1) Representatives of the various interest groups you hope to involve.
- (2) Persons who have either extensive knowledge and/or experience in the areas to be covered at the conference.
- (3) Persons who have strong organizational abilities.
- (4) Persons who have some knowledge or experience in promotion, public relations or other media fields.
- (5) Persons who have a knowledge and understanding of group dynamics.

For the majority of conferences, the planning committee need not exceed 10-12 persons. Where conferences are extremely large and complex in structure, professional assistance may be required.

### **Example**

If a conference were concerned with evaluating social welfare services, the central planning body might include:

- ( 1) a representative of the press, radio or TV
- ( 2) a poor person
- ( 3) an unemployed person
- ( 4) a recent immigrant
- ( 5) a senior citizen
- ( 6) a student or drop-out
- ( 7) a single parent
- ( 8) a representative of an educational institution
- ( 9) a representative from a government agency
- (10) a representative of a voluntary agency in the community
- (11) an amateur or detached worker
- (12) a business man

At first glance, such a committee appears to be overloaded with persons who may lack strong organizational skills. However, consumers of the services in question must have a strong voice in the planning activities to ensure that a comprehensive view of these services is presented at the conference. It is important to remember that the professionals involved have many more

resources at their disposal (e.g. clerical assistance, greater access to information, community support.) This means that they, as individuals, can exert a greater influence on total planning. In the planning committee suggested above, we have attempted to offset this bias.

Where one hopes to achieve any kind of social change, it is essential that representatives of the various power structures participate in the conference. However, this group alone should not be responsible for the planning.

## **CHOOSING THE CO-ORDINATOR**

Assuming that one is not hiring a professional co-ordinator, one would look for a person with strong organizational skills and the ability to work with – and give direction to – a very heterogeneous group of people. He should be well informed about the issues at hand, but need not be a specialist in these areas. His most important function is to ensure that those involved in the planning process are able to work together on strategy and meet work deadlines. His role and lines of authority should be clearly defined as it is virtually impossible to function in this capacity without considerable freedom of action.

## **PLANNING COMMITTEE MEETINGS**

So long as the activities of the planning committee are co-ordinated and in line with strategy, the frequency, composition and agenda of individual meetings should be kept as flexible as possible to accommodate the individual needs of committee members.

If possible, at one of the first meetings the co-ordinator should present an all-inclusive statement on goals, projected expenditures and conference structure. A concrete presentation helps to focus the attention of a newly formed committee on the issues at hand and can eliminate much fruitless discussion. Committee members can question the validity and/or feasibility of his presentation, and alter or add to it where necessary or desirable.

Early in the planning stages, goals should be clearly defined, the potential audience examined, and a strategy agreed upon.

Once planning is well underway, it is seldom advisable to accept new members on the central planning body. Such changes often

result in a change of focus and a resulting shift in strategy. At best they tend to retard the progress of the committee as a group.

It is very important that the co-ordinator acquire a commitment from his planning committee at the outset and provide an opportunity for their **immediate** participation in some aspect of the conference planning. Responsibilities may be divided among committee members by organizational function or sectors of the audience.

There is no simple formula for determining the length of time required to plan a given conference.

For large, complex conferences, planning and organization can take up to a full year. However, planning time should not be excessive as the interest of committee members tends to wane.

## **CHOOSING A CONFERENCE THEME**

The most important factor in choosing a conference theme is to ensure that **all** of your potential audience can identify with it.

If you are hoping to attract one professional group, a theme which focuses on some particular aspect of their work might be appropriate.

However, when organizing a community conference, it is preferable to select a theme which conveys the importance of and need for participation and involvement in community life. It should also convey how each individual can be involved in the conference.

## **PUBLICITY AND PROMOTION**

Assuming one has a limited budget, what means can be used to publicize or promote a conference?

- (1) **Letters to local newspapers or magazine editors** arousing interest in your areas of concern prior to the conference.
- (2) **Press releases** to the editors of local press informing them about your conference.
- (3) **Radio or TV announcements.** Many radio and TV stations will provide air time as a public service, particularly if the conference is of general interest to the whole community.
- (4) **Posters or signs** in public places.

(5) **Brochures, pamphlets, registration forms, etc.**

Although an attractive brochure can be a very effective means of publicizing and promoting a conference, printing costs should be given careful consideration. Frequently, groups produce "slick" folders and brochures while economizing on activities and materials which can make the conference more exciting and meaningful to those who attend. Also, if the conference is being financed by government or from voluntary donations, very slick brochures may be considered a waste of conference funds because of their temporary nature. A reasonably simple folder can serve the needs of most groups, if the theme selected is appropriate and the information provided explicit.

Registration forms should always include the time, location, registration fee (if any), and rough outline of the program. If the form is not pre-addressed, a return address must also be included.

Those with limited funds might use amateur artists and printers enrolled in vocational schools or community colleges to reduce printing costs. Work might also be done by centres for the handicapped. If planning to use a professional printer, it is preferable to give your contract to businessmen in the community where you wish to hold the conference.

## **SELECTING A DATE AND TIME**

Conferences for professional groups are usually held within business hours during the slackest period of the year for the particular group. However, community conferences must be scheduled outside business hours to allow working people to attend. The summer months prove unsatisfactory since a large number of people are away from home on weekends and vacation periods.

The length of the conference must be determined on the basis of content, the structure of the program, and the possibility of participants attending for any given period.

## **SELECTING ACCOMMODATION**

In selecting accommodation for a conference, consider the following:



- ( 1) Will guests require overnight accommodation? If so, is it available at the same location or in the immediate vicinity? Will all guests be able to stay in one place? Is the cost of overnight accommodation prohibitive for the non-subsidized guest?
- ( 2) The need for a registration area if guests have not been pre-registered.
- ( 3) The size of your potential audience if you have not pre-registered.
- ( 4) The availability of facilities such as sound systems, electrical outlets, black-out curtains, air-conditioning, auditoria.
- ( 5) Size and type of rooms available.
- ( 6) Parking and/or connections with public transportation.
- ( 7) What meals and social activities can be provided on the premises or in the immediate vicinity?
- ( 8) Access to the building prior and subsequent to the conference.
- ( 9) Building regulations re smoking, posting bills, serving of food and beverages, etc.
- (10) Display areas.
- (11) Proximity to social activities in the city.
- (12) Total cost of accommodation.

## REGISTRATION

Particularly if the conference is a large one, at least three weeks is required to finalize arrangements for meals, workshops and the allocation of accommodation for individual activities.

In planning either a one day or a very large conference, it is preferable to either pre-register guests by mail or on the evening prior to the conference program. If sufficient funds are available, hosting an informal reception after the evening registration is one effective means of allowing participants to meet and exchange ideas prior to the conference itself.

If pre-registering, program registration forms should be mailed out six weeks before the conference allowing participants about three weeks to return them.

Considerable time can be saved if receipts, lapel cards, meal tickets, admission cards for individual sessions, etc., can be mailed out to those registered prior to the conference. If the group is a very mixed one, it is also desirable to send out any information or reading materials at this time.

Whether or not participants are pre-registered, a small registration desk is required with alphabetical lists of all those registered and the sessions to which they have been allocated, as some participants are certain to misplace their tickets or other information. In addition, one may plan to hand out kits or resource material at the conference itself.

One relatively simple way of recording registrations and session choices is by using a wall chart like the following. (Each session should have the same number of squares per line to simplify reading.)

SESSION							MEAL		
1	2	3	4	5	6		1	2	3

As each person registers, an x or  $\checkmark$  is marked under each session to which he is allocated and under each meal he will require. When registration is closed, it is relatively simple to select the accommodation for each session on the basis of numbers enrolled and the facilities required.

If, on the other hand, one wishes to have sessions of the same or limited size, persons can be assigned to similar or related sessions where one is over-subscribed or, a second session in the same subject area can be set up.

If all participants are allocated to the sessions of their choice, such a chart is very helpful in planning future conferences as a graphic illustration of the general areas of interest of those who are likely to attend.

For smaller conferences, with no meals provided or where meal tickets can be sold at the opening of the conference, registration may be carried out the morning of the program. However, for a conference of more than 100 people, it is not advisable to attempt to register the first day of the conference.

To set up a registration desk, registration cards should be set out with pencils so that participants can pick them up and fill them in

themselves. It is advisable to request that registrations be printed as some handwriting is illegible. The main registration desk can then be divided into alphabetical sections (e.g. A-E, F-L, M-Q, R-Z), the range of each unit varying with the numbers expected.

If money is to be exchanged, someone should be delegated to set up and receive the cash for each section, check cash received against the number registered in each section, and deposit funds either with the hotel or in a bank.

Lapel cards must be typed or handwritten, receipts filled out, and resource material or kits handed out.

Again, depending on the size of the conference, all of these duties may be performed by one registration person, or work may be divided among cashiers, registration clerks, and information staff.

## **SIGNS AND DIRECTIONS**

Conference planners often become so familiar with the conference site that they tend to overlook the need for signs and directions.

If one is using a very large building with an unusual floor plan or if activities are spread out throughout the building, it is sometimes advisable to provide participants with a floor plan indicating individual activities and facilities. In addition, large, colourful or striking signs should be posted in all places where persons might go in alternant directions. In a hotel, many of these signs will be provided. However, in schools and community halls, the responsibility for making and posting signs rests with the conference organizers. One may find, too, that the building selected has special regulations regarding the kinds of signs which may be posted and the kinds of adhesives or staples used.

At all times, at least one person should be on the registration desk to provide information and directions to those who have lost their way.

If finances permit or if volunteers are available, guides can be very helpful in large centres such as universities, community colleges and high civic buildings.



## CONFERENCE STRUCTURE

The way in which activities are structured is perhaps the most important factor in determining the kinds of learning, interaction, involvement and commitment which will result from your efforts.

What can be done, then, to animate, stimulate or educate a group of people?

Consider the various activities and experiences a conference might include and the primary function they serve.

### Activity

Speech or Lecture

Group Interview

Symposium

Forum

Panel

Debate

Film

Demonstration

Tour or field trip

Film

Display or Exhibit

Multi-Media Environmental

Experiences

Experiential Training Session

Brainstorming

Buzz Groups

Workshops or Seminars

Question and Answer Sessions

Under Fire Panels

T. Groups

Discussion Groups

Meals

Social Activities

Evaluations

Polls

Surveys

### Primary Function

To convey a specific message or ensure that all in attendance have a minimum of information about the issues at hand.

To provide an opportunity for learning through direct involvement or experience.

To provide an opportunity for dialogue and feedback.

To provide an opportunity for participants to meet and exchange ideas on a very informal level.

To provide an opportunity for participants to express their views on the issues discussed and on the conference in general.

Certainly structure alone cannot make a conference effective. Your success in attracting the group you hope to reach, the quality of speakers, resource people, films, displays, etc., will also be major factors. However, "good" people can be highly ineffective if structure is not given careful consideration.

We must then:

- (1) Convey information
- (2) Create an environment that is conducive to good communication and learning
- (3) Provide opportunities for the immediate involvement and participation of those in attendance
- (4) Promote dialogue
- (5) Provide an opportunity for guests to evaluate the conference

In order to arrive at concrete decisions at a larger conference, it is essential that the group be broken up into smaller units.

Again depending on your aims, small groups may assemble voluntarily, the group may be evenly divided alphabetically, numerically, by age, by sex, or by interest, or the planning body may choose to arbitrarily assign participants to individual groups to ensure the broadest possible representation in each.

## **SELECTING SPEAKERS, PANELISTS, FILMS, DISPLAYS or MULTI-MEDIA PRESENTATIONS**

If the central feature of the program is to be a speaker or panel, one needs people who are dynamic, controversial, and well informed. An equally important factor is their ability to relate to the group on its own terms. Participants should be able to relate to the resource people as well as the issues.

At a community conference, resource people should be chosen from all socio-economic and educational levels.

Ask those selected to submit an outline of what they propose to say or do prior to the conference. Such submissions give the sponsor a better idea of what will be covered and secondly, provide him with a framework for the conference report.

Films may focus on a single point of view, present a variety of points of view and experiences while drawing no conclusions, or present a number of alternatives while strongly supporting one of them. The N.F.B.'s *Alinsky* series or the A.F.B.'s *Ghetto* for

example are effective since they evoke a highly individual response on the part of the viewer. A film which presents objective, yet general views on issues such as poverty, teacher training, community development, etc., often requires supporting activities to generate dialogue. Films selected or produced should be in hand at least two weeks prior to the conference for previewing.

Slides, film strips, film sound tracks, samples of natural and man-made products and other visual aids can be used very successfully to convey information through direct experience. If the content is familiar to the group, people may selectively perceive those things of which they are already aware. To avoid this, it is preferable to present familiar but unrelated sounds, smells and images simultaneously to alter one's normal perception of things. Tours and/or displays can also be used to convey information.

## **SELECTING DIALOGUE ACTIVITIES**

Large meetings or question and answer sessions can be very effective when the issues at hand can be clearly defined or identified. However, for more general areas of concern, a few speakers may dominate the session while the majority neither participate nor involve themselves in the discussion.

In dealing with issues where the response is likely to be highly individual, small workshops, sensitivity groups, or under attack panels provide greater opportunity for individual expression.

Any conference which brings together many people who are not acquainted with one another should include some kind of informal social gathering.

## **CHOOSING SESSION RECORDERS**

If a session has only one or two speakers at the front of the room, the most effective way of recording it is on tape. However, for workshops and seminars, taping is not always adequate or even desirable. If the volume is set sufficiently high to pick up all the voices in the room, it will also pick up coughs, feet shuffling and whispering. Such tapes are virtually impossible to transcribe and the cost of transcription can be staggering.

If the content of the session must be recorded verbatim, one should use a secretarial team, as relatively few secretaries can take shorthand for a full hour with no break. If, on the other hand, one requires only a general or point form report on proceedings, one person who is relatively knowledgeable in the field can fulfill this role. If a group does not have the resources to hire secretaries or rent tape recorders, one might consider hiring students in business courses or recruiting volunteers.

Reports on all sessions ought to be submitted to the sponsor by, at the latest, a week after the conference.

## **PROVIDING FACILITIES FOR THE MEDIA**

In order to obtain the best possible coverage in the communications media, it is advisable to notify the press and local radio and T.V. stations of the event approximately two months in advance. Follow up this notification with a press release giving as many pertinent details as possible about two weeks before the conference and a 'phone call perhaps three days beforehand as a reminder. In most cases, the various media will indicate whether or not they plan to attend. If T.V. representatives have indicated an interest in the conference, find out what facilities or special equipment they will require and ensure that they are available (e.g. pre-arranged interviews and space for same, mobile unit parking, advance set-up time).

Where possible, reserve a separate room for the use of media people exclusively which is staffed by a person qualified to discuss the aims and objectives of the conference planners and details of the program.

If material has not been forwarded in advance, have on hand additional copies of the conference program, a list of session chairmen and resource people, a map or directions indicating the location of the various sessions and passes to all conference activities, should they be required. All of this material can be provided in a kit along with a lapel card. In addition, a press room should have a few writing tables, one or more telephones and space where elaborate equipment can be left for safekeeping.

In many instances, it is not possible to have the press room adjacent to the registration desk and a press table is required at the door to provide information.



Where it is not possible to provide a press room, a special desk at the main door can fulfill many of the same functions.

As an added note, a great deal of inconvenience to both conference participants and media representatives can be avoided if seats for media people either on an aisle or near the door are reserved in all conference sessions including meals.

## **SETTING UP DISPLAYS**

Displays may include audio-visual presentations, information handouts, books and brochures for viewing or art work.

If planning a book display only, one may contact the Canadian Book Publishers Council who will notify the publishers in the area about the conference and advise the sponsor as to who will attend. However, for displays of any particular type of product, manufacturers must be contacted directly.

The invitation should include details such as the size and shape of space available to individual participants, existing electrical outlets, lighting and drapery, viewing hours and deadlines. When all arrangements have been made, a simple floor plan of the display area, indicating where each participant is to be located should be drawn up.

More elaborate displays involving film showings, multi-media experiences, etc., can prove costly unless one is successful in finding manufacturers who are willing to provide materials and set up the display as a form of publicity.

## **ARRANGING MEALS**

As soon as the location has been chosen, select menus for the various meals required.

If the accommodation selected does not provide catering services, commercial catering firms must be contacted. Beware of buffet style meals for conferences of more than 200 people as a minimum of two hours is required to serve a large number. A fixed menu enables staff to place a number of items on the table before the luncheon period and greatly speeds up the service of the main courses.

Luncheon prices will vary from \$2.00-\$6.00 per person while dinner prices may reach \$8.00-\$10.00 per person if provided by a profit-making organization. Where funds are extremely limited, one might look into the possibility of using church groups or women's service clubs as caterers. In most instances, bar facilities should be provided at the consumer's own personal expense.

When ordering food, one should consider such things as the combined attractiveness of the various items, whether or not it can be cooked ahead of time and kept warm, whether or not it is acceptable to all religious groups who will attend, its price in relation to your total budget, its general popularity (avoid unusually seasoned or rare foods) and, if buying directly, whether or not it is seasonal (e.g. fresh fruit desserts may cost more than \$1.00 per person in the winter months).

If arranging a small reception for 25 to 30 people, it is usually more economical to rent a room or suite at full cost and bring in one's own refreshments. If buying hors d'oeuvres or coffee for such a reception, it is recommended that you buy food by the platter and coffee by the urn rather than on a per capita basis.

## CONFERENCE EVALUATION

In drawing up a conference evaluation, one should consider the following:

- (1) degree to which the conference achieved initial goals
- (2) validity of initial goals and priorities.
- (3) reaction of guests to individual conference sessions and activities, and to the conference as a whole.
- (4) degree to which attitudes, values and/or commitments were changed by the conference itself.
- (5) suggestions from participants as to how the conference might have been improved.
- (6) suitability of accommodation and facilities.

It is often helpful to ask questions regarding issues and hopes for the conference both prior and subsequent to the conference to determine whether or not any significant changes in attitudes, values, or points of view have taken place:

If the conference was designed to promote individual or social action, make an effort to obtain some follow-up as to what immediate action followed the conference, and how long such action was sustained.

## THE CONFERENCE REPORT

One should attempt to produce and distribute the conference report before interest wanes. It is preferable to provide a reasonably simple report promptly than to spend months preparing a slick piece of printing and journalism. To expedite the production of the report, all persons making any kind of presentation should be asked to provide the sponsor with a reproducible draft just prior to the time of the conference. In addition, recorders of individual sessions ought to be given a deadline for submitting their reports.

By having large sections of the report written by program participants, production becomes a job of editing and composition rather than of writing. With this technique, there is less chance of misinterpreting or misrepresenting what has been said. If staff must be specially engaged to write a report, much time may be lost in getting the approval of the many resource people who have taken part in the conference.

In some instances, the planning committee may feel that they all should share in the production of the report. However, this arrangement is rarely successful as individuals will have different writing styles and different approaches. In the event that this desire is expressed, usually a few meetings will bring out the many problems involved in this arrangement. It is preferable to have all content approved by the planning committee while assigning one or two persons to write the material.

## A CHECK LIST FOR THE CO-ORDINATOR

This list is by no means all inclusive but can serve as a helpful guide to the novice in this field.

### A. Date, Time & Location

- (1) Does the date selected conflict with any major local event?
- (2) Is the time selected suitable for those with families, those who are employed, those from out-of-town, etc.?
- (3) Is there sufficient accommodation available for out-of-town guests?
- (4) Does the accommodation selected have such facilities as:
  - (a) overnight accommodation
  - (b) a theatre or blackout curtains for films



- (c) sufficient electrical outlets for equipment required
  - (d) catering services
  - (e) rooms for all small or large groups you intend to have
  - (f) accessibility for setting up and dismantling displays, etc., prior and subsequent to the conference
  - (g) a public address system
- (5) How much time will be lost in emptying rooms, moving people from one room to another etc.?
  - (6) Will people have difficulty finding their way around?
  - (7) Is there parking available and public transportation to accommodation at appropriate times?

## **B. Mailing Lists**

- (1) Have you all mailing lists in hand and all envelopes typed so that material can be sent out by the deadline you have set?
- (2) Have you covered all the interest groups who might attend?
- (3) Are you planning to restrict registration? If so, how will you determine who is to be invited?
- (4) Have you sent invitations and materials to special guests who may not be able to attend the entire conference?

## **C. Registration**

### **Pre-registration**

- (1) Does your form include a conference title which indicates the theme and tone of the conference; the location; the name, business address, home address and telephone numbers of participants; a return address so that it will be directed to the proper person; a list of facilities available (e.g. parking, babysitting); the registration fee, if any; to whom cheques or money orders should be made out; the registration deadline date; a general outline of the program and a list of sponsors.
- (2) Is your registration form being sent out early enough to allow time for its return and confirmation?
- (3) Do you have an alphabetical list of all those registered at the front desk in the event that some participants lose their admission cards, meal tickets, etc.?
- (4) Will you accept registrations at the door?
- (5) Have you any way of knowing the identity and number of those registered who actually arrive?

- (6) Is a dinner count required or are you paying for a minimum number? If accepting late registrations, is your estimated count adequate?
- (7) Are name tags already filled out? If not, have you considered what information you wish to have on them (e.g. name, organizations, locale or city, interest groups)?

#### **Same-Day Registration**

- (1) Do you have sufficient staff to process the numbers anticipated in the time allowed for registration?
- (2) If accepting money, do you have sufficient change in your cash set-up and have you arranged for its safe-keeping when registration is closed?
- (3) Do you have registration forms, pencils, paper, programs, kits, etc., on hand?
- (4) Note 6 and 7 in the previous paragraph.

#### **D. Speakers, Panels, Workshops, Etc.**

- (1) Have you given each speaker or resource person a detailed written outline of his duties and responsibilities, where he will be located, the time he is allotted, etc.?
- (2) Have you checked with all resource people as to whether they will require any special equipment? If so, have you arranged for it to be on hand?
- (3) Have you on hand drafts of all speeches and presentations to be given by resource people?
- (4) Are the rooms selected sufficiently large and adequately equipped for the particular group attending each session?

#### **E. Administrative Staff**

- (1) Have you prepared a detailed list of all the duties of each staff member of the conference to avoid overlooking certain details while duplicating efforts in another area?
- (2) Have you given each staff member a list of not only his own duties, but those of all other staff members as well so that each person can give out information to participants should they have any questions?
- (3) Have you arranged a work schedule for staff allowing for coffee breaks, luncheon, etc.?

## **F. Meals and Coffee**

- (1) Have you allowed sufficient time in your program for meals and coffee breaks?
- (2) Will it be necessary to stagger groups for meals?
- (3) Do you plan to have a head table? If so, have you arranged for decorations, seating, microphones, etc.?
- (4) Have you made arrangements for a final dinner count to caterers?
- (5) Do you have staff to collect meal tickets?

## **G. The Day of the Conference**

- (1) Have you arranged to meet with all staff to ensure that everyone is on duty, is aware of his responsibilities, and has whatever equipment he requires on hand and in working order?
- (2) Are all conference functions clearly marked by signs, etc.?
- (3) If you have a large group in a theatre or auditorium, have you arranged to have them enter or exit by a number of doors if your day is tightly scheduled?
- (4) Have you arranged to have all sessions recorded? Tape recorders are of limited use for large groups where a number of people are speaking.
- (5) Will meals and coffee be served as scheduled?
- (6) Have you lists of the duties of all staff people in hand so that you can locate anyone you might need?

## **H. After the Conference**

- (1) Have you arranged for the removal of equipment, displays, etc.?
- (2) Have you received invoices and paid all staff people?
- (3) Have you drawn up some method of evaluating the conference?
- (4) Have you copies of all presentations, papers, speeches, etc., in hand for the conference report plus all tapes and scripts of session recorders?
- (5) Have you envelopes addressed for the mailing of the report?
- (6) Have you appointed a staff member to edit materials and write up the report? Do you wish to enclose an evaluation form?

## **I. Tips for the Co-ordinator**

- (1) Always prepare a detailed budget, plan of the day's activities and planning schedule or check list of your own duties.
- (2) Select a chairman who can abide by the schedule set out. If you plan to start at 9:00 a.m., for example, proceed even though all people may not be in their seats. By so doing, participants will realize that you plan to stay on schedule for the duration of the conference.
- (3) Make sure that the chairman has a detailed outline of the program in terms of time, staff, etc. Also provide him with a script indicating each time he is required to speak. Frequently, chairmen will overlook thank you's, acknowledgements, or announcements without such assistance.

CONFERENCE PLANNING SCHEDULE

COMMUNITY

NAME OF CONFERENCE
LOCAL CO-OPERATING ORGANIZATION
DATE AND TIME

EXPLORATORY VISIT AND MEETINGS	
CONTACTS	DATE

PRELIMINARY REPORT			
DATE	IMMEDIATE SUPERVISOR	INTERMEDIATE SUPERVISOR	ULTIMATE SUPERVISOR
SUBMITTED			
APPROVED			

PLANNING COMMITTEE SELECTED		
NAME	ORGANIZATION – ADDRESS	PHONE NO.

PLANNING COMMITTEE MEETINGS

CONFERENCE PLANNING SCHEDULE (Cont'd.)

MAILING LISTS	DATE TO BE SUBMITTED BY

CONFERENCE STRUCTURE – PROGRAM OUTLINE

SUGGESTIONS FOR CHAIRMAN AND KEY SPEAKER

PREPARATION OF BUDGET	DATE

PROGRAM OUTLINE AND BUDGET SUBMITTED FOR APPROVAL	DATE SUBMITTED	DATE APPROVED

SPECIAL INVITATIONS

DATE	NAME – POSITION	DATE REPLIED	Accepted	
			Yes	No

PRESS RELEASES

DATE PREPARED	DATE SUBMITTED	DATE APPROVED	DATE RELEASED
1			
2			
3			



# CONFERENCE PLANNING SCHEDULE (Cont'd.)

DISPLAYS		
LOCAL SLIDES – PICTURES		TO BE OBTAINED BY
TAPE RECORDER		
FILM		
PROJECTORS		
BULBS		
CORDS		
ORGANIZATION'S LITERATURE		
DATE SHIPPED	DATE RECEIVED	RECEIVED BY
PARTICIPATION OF OTHER ORGANIZATIONS IN DISPLAYS		
SPECIAL EQUIPMENT REQUIRED		
PROVIDED BY HOTEL OR HALL		
SHIPPED BY PLANNING GROUP		
SPECIAL SERVICES REQUIRED		
PRINTING – PROGRAM, REGISTRATION FORM, AND QUESTIONNAIRE		
COPY PREPARED AND SUBMITTED	COPY APPROVED	COPY SENT TO PRINTER
RECEIVED FROM PRINTER	DATE MAILED	NUMBER RETURNED



### CONFERENCE PLANNING SCHEDULE (Cont'd.)

[illegible]

### SUBMISSION OF SPEECHES OR RESOURCE MATERIAL

[illegible]

## SPACE ACCOMMODATION

## ROOMS AVAILABLE

ALLOCATION OF SPACE	

## ACCOMMODATION FOR OUT OF TOWN GUESTS

NO. AND TYPE OF ROOMS	DATE BOOKED

## MEALS

LUNCHEON	TIME
COFFEE BREAKS	TIMES

[illegible][illegible][illegible]

DATE COMPLETED	DATE SUBMITTED FOR APPROVAL	DATE APPROVED
DATE TO PRINTER	DATE RECEIVED	DATE MAILED

**CONFERENCE PLANNING SCHEDULE (Cont'd.)**

EVALUATION
NUMBER OF QUESTIONNAIRES MAILED OUT
NUMBER OF QUESTIONNAIRES RETURNED

## NOTES

## NOTES

## NOTES







Ontario Ministry  
of Culture and  
Recreation

Citizenship  
Division

Hon. Reuben Baetz  
Minister  
Douglas Wright  
Deputy Minister

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CITY OF TORONTO

# Conference Planning









CA2 BN5M 20  
-73056

# Conference Planning

by W. Steinkrauss



Ontario

Community Development Branch

Ministry of Community and Social Services

Hon. Rene Brunelle  
Minister

T. M. Eberlee  
Deputy Minister



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## INTRODUCTION

Every year, hotels, universities, private clubs, and community centres across North America open their doors to commercial enterprises, voluntary organizations, citizens groups, professional associations, and government departments for the purpose of holding a conference.

While some of these conferences may be deemed an outstanding success, many fall short of the goal set by sponsoring bodies, and often fail to meet the expectations of those who attend. Undoubtedly, much of this failure is due to inadequate planning.

In planning a conference, it is essential to define goals and priorities, identify and examine the potential audience, agree on a strategy, look at practical considerations (e.g. available financial and human resources, accommodation requirements, possible locations), and build in some means of assessing and evaluating what has been accomplished.

Over the past few decades, there appears to have been a commonly accepted assumption that conferences can solve almost any problem or fulfill any purpose. To some degree this may be true, but it must always be kept in mind that alternative courses of action may in many instances be considerably more appropriate than the conference format.

This manual is a collection of guidelines for those interested in participation and involvement within a conference setting. No attempt is made to suggest alternatives to holding a conference.

It is hoped that, by working through the suggestions below, organizations and individuals interested in holding a conference in the future will have a better understanding of the potential advantages and structural limits of this particular communicative medium.

### **Defining Goals and Priorities**

One may use a conference as a launching point for a program of action, as a learning process for participants, as a means of attracting publicity or arousing public interest around certain issues, or for many other purposes.

The following are some of the more common goals:

- (a) To convey specific information to a group of people
- (b) To stimulate a group of people to be more involved in a specific project or area of interest
- (c) To provide an opportunity for people who share common interests or experiences to meet and exchange ideas
- (d) To animate people to participate in community life regardless of their particular interests
- (e) To test an idea or hypothesis on a group of "informed" people
- (f) To test an idea or hypothesis on a random sample of people
- (g) To "sell" an idea or product
- (h) To improve inter-personal relationships and/or morale in a given setting

Frequently one's goals will encompass a number of these and other factors. However, for the purposes of planning a conference it is important to be able to articulate these goals and list them in order of priority.

### **The Potential Audience**

Having defined the goals, it is then possible to identify a potential audience. At the outset, it is perhaps wise to ignore practical considerations and attempt to identify all those who ideally might attend. By so doing, it is much easier at a later date to set limitations on participation while maintaining the kind of representation one wants or needs.

The size and composition of the group will greatly affect the kind of structure needed to bring about maximum communication and involvement at the conference. In turn, both factors will determine accommodation needs.

Most of us are successful in reaching colleagues in our own profession, the perennial conference goer, or those who see their own interests clearly at stake. The ultimate question is how can one reach the so-called "inarticulate" groups or individuals in our society — those who do not participate, seem uninvolved, or appear uninterested.

A slight over-representation of such groups in the planning body is suggested as one means of involving them. Secondly, a larger portion of the publicity may be specifically directed towards them.

Having identified a potential audience, consider the following: Will they be free to attend? Are they part of the labour force? Are they within reasonable proximity to the suggested conference site? Do they speak the same language? Do they have access to the same information? Can they afford to pay transportation costs or a registration fee? Will day care present a problem for them? Do they follow religious or cultural traditions which may affect their participation or involvement (e.g. dietary laws, role limitations,)?

In view of these or other similar factors one should consider the advantages and/or disadvantages of holding a national, provincial, regional or community conference and the basic structure necessary to accommodate the special needs of the group.

### **Agreeing on Strategy**

To some community organizers, group leaders, and staff development people, the word 'strategy' smacks of manipulation, paternalism, or outright deceit.

However, where a group of people are involved in a planning process, agreement on strategy is of paramount importance. It is vital to establish a set of clearly stated ground rules designed to achieve the goals and accommodate the priorities already agreed upon by the group (e.g. persons, if any, to receive special consideration, budget priorities, the kind of representation desired in various sessions. Otherwise, for example, planning committee members may select program participants whom they support ideologically or professionally but who cannot provide the input necessary to achieve conference goals.

It is important that one's strategy be sufficiently flexible to allow individuals involved in the planning the necessary freedom of action to organize, promote or co-ordinate a given aspect of the conference without compromising on overall goals.

### **Example**

In organizing a community conference which is to include representatives from all sectors of the community and focus on their relationship to the total community, individuals will require considerable freedom of action in terms of publicity, promotion, and structure of sessions, to successfully involve the many diverse groups. However, sessions focussing on the special concerns of one group (e.g. students, the poor, the single parent family), cannot exclude representatives of other groups if these problems are to be viewed in the context of the total community.



## **The Budget**

In drawing up a budget, the following factors must be considered:

- (1) Promotion and publicity
- (2) Accommodation and facilities
- (3) Speakers, panelists, group leaders, technicians, commissionaires, etc.
- (4) Meals and entertainment
- (5) Telephone calls, postage costs, etc.
- (6) Administrative and clerical assistance
- (7) Printing of programs, folders, reports, etc.
- (8) Supplies (e.g. paper, lapel cards, sound equipment, signs, display material)

It is vital to obtain estimates on major expenditures and, if estimated expenditures are in excess of available funds, one might consider the following:

- (1) Charging a registration fee
- (2) Soliciting voluntary donations
- (3) Recruiting volunteers to organize and staff the conference

If the conference is being sponsored by a voluntary agency, citizens' group, or other organization working with a limited budget, it may be desirable to conduct a fund raising campaign. Funds can often be obtained from private donors, industry, foundations, or government departments. In return for their financial assistance, most contributing bodies will expect to be included in the credits on printed material, asked to take part in the conference as speakers, or asked to provide some kind of display. Groups who are repeatedly going to the public for financial assistance are very conscious of the importance of giving their donors public recognition.

## **Human Resources Available**

Attempt to identify all those persons who can contribute to the planning or the activities of the conference. It is extremely important to include representatives of the various interest groups you hope to involve in the conference. All too frequently, conference planning is left to experts who have a wide variety of talents and skills but who cannot relate directly to some of the less articulate segments of the population.

In addition to representatives of various interest groups, consideration should be given to persons who have special technical, organizational, or group leadership skills, persons who can make

an academic contribution, public relations people, media representatives, and so on.

Do not overlook the possibility of utilizing many willing and competent non-professionals in the community. Where the assistance of professionals is available, attempt to utilize their contacts or special skills rather than involving them in a host of details which can be handled by community volunteers.

## **WHERE TO BEGIN**

It is essential to realize that one cannot plan and organize a conference alone. While it is possible to hire or appoint a professional or outside co-ordinator who may be highly skilled in the mechanics of organizing a conference, his role should not be confused with that of the planning committee.

The professional co-ordinator can be most effective only when a sponsor can provide:

- (1) A clear definition of conference goals.
- (2) An approved operating budget to purchase goods and services.
- (3) Some general guidelines, e.g. desired audience, possible dates, time allowed.

In most circumstances the role of the planning body is to make these kind of decisions.

In the majority of cases, groups do not have the resources at their disposal to hire a professional co-ordinator. Instead they select one of more members of the planning body to fulfil this role. In fact, this is in many ways a more desirable arrangement for groups interested in developing leadership skills.

## **HOW TO CHOOSE THE PLANNING COMMITTEE**

If a planning committee is to be effective, the number of members should be limited. In the case of very large conferences, it is preferable to set up a number of sub-committees to deal with specific aspects of the conference rather than having all of these people represented on the major planning body.

Members of this committee should have time, resources, and skills to contribute. In some instances, a person with a host of contacts or a person who has considerable status in the community may be

included to gain recognition and publicity for the conference. However, beware of overloading the planning body with such people unless they are prepared to do a considerable amount of work on your behalf. While a conference may be "successful" in the view of those who read the newspapers, it may completely fail to achieve your goals.

What kind of representation, then, should one strive for on the planning body?

- (1) Representatives of the various interest groups you hope to involve.
- (2) Persons who have either extensive knowledge and/or experience in the areas to be covered at the conference.
- (3) Persons who have strong organizational abilities.
- (4) Persons who have some knowledge or experience in promotion, public relations or other media fields.
- (5) Persons who have a knowledge and understanding of group dynamics.

For the majority of conferences, the planning committee need not exceed 10-12 persons. Where conferences are extremely large and complex in structure, professional assistance may be required.

### Example

If a conference were concerned with evaluating social welfare services, the central planning body might include:

- ( 1) a representative of the press, radio or TV
- ( 2) a poor person
- ( 3) an unemployed person
- ( 4) a recent immigrant
- ( 5) a senior citizen
- ( 6) a student or drop-out
- ( 7) a single parent
- ( 8) a representative of an educational institution
- ( 9) a representative from a government agency
- (10) a representative of a voluntary agency in the community
- (11) an amateur or detached worker
- (12) a business man

At first glance, such a committee appears to be overloaded with persons who may lack strong organizational skills. However, consumers of the services in question must have a strong voice in the planning activities to ensure that a comprehensive view of these services is presented at the conference. It is important to remember that the professionals involved have many more

resources at their disposal (e.g. clerical assistance, greater access to information, community support.) This means that they, as individuals, can exert a greater influence on total planning. In the planning committee suggested above, we have attempted to offset this bias.

Where one hopes to achieve any kind of social change, it is essential that representatives of the various power structures participate in the conference. However, this group alone should not be responsible for the planning.

## **CHOOSING THE CO-ORDINATOR**

Assuming that one is not hiring a professional co-ordinator, one would look for a person with strong organizational skills and the ability to work with – and give direction to – a very heterogeneous group of people. He should be well informed about the issues at hand, but need not be a specialist in these areas. His most important function is to ensure that those involved in the planning process are able to work together on strategy and meet work deadlines. His role and lines of authority should be clearly defined as it is virtually impossible to function in this capacity without considerable freedom of action.

## **PLANNING COMMITTEE MEETINGS**

So long as the activities of the planning committee are co-ordinated and in line with strategy, the frequency, composition and agenda of individual meetings should be kept as flexible as possible to accommodate the individual needs of committee members.

If possible, at one of the first meetings the co-ordinator should present an all-inclusive statement on goals, projected expenditures and conference structure. A concrete presentation helps to focus the attention of a newly formed committee on the issues at hand and can eliminate much fruitless discussion. Committee members can question the validity and/or feasibility of his presentation, and alter or add to it where necessary or desirable.

Early in the planning stages, goals should be clearly defined, the potential audience examined, and a strategy agreed upon.

Once planning is well underway, it is seldom advisable to accept new members on the central planning body. Such changes often

result in a change of focus and a resulting shift in strategy. At best they tend to retard the progress of the committee as a group.

It is very important that the co-ordinator acquire a commitment from his planning committee at the outset and provide an opportunity for their **immediate** participation in some aspect of the conference planning. Responsibilities may be divided among committee members by organizational function or sectors of the audience.

There is no simple formula for determining the length of time required to plan a given conference.

For large, complex conferences, planning and organization can take up to a full year. However, planning time should not be excessive as the interest of committee members tends to wane.

## **CHOOSING A CONFERENCE THEME**

The most important factor in choosing a conference theme is to ensure that **all** of your potential audience can identify with it.

If you are hoping to attract one professional group, a theme which focuses on some particular aspect of their work might be appropriate.

However, when organizing a community conference, it is preferable to select a theme which conveys the importance of and need for participation and involvement in community life. It should also convey how each individual can be involved in the conference.

## **PUBLICITY AND PROMOTION**

Assuming one has a limited budget, what means can be used to publicize or promote a conference?

- (1) **Letters to local newspapers or magazine editors** arousing interest in your areas of concern prior to the conference.
- (2) **Press releases** to the editors of local press informing them about your conference.
- (3) **Radio or TV announcements.** Many radio and TV stations will provide air time as a public service, particularly if the conference is of general interest to the whole community.
- (4) **Posters or signs** in public places.



(5) **Brochures, pamphlets, registration forms, etc.**

Although an attractive brochure can be a very effective means of publicizing and promoting a conference, printing costs should be given careful consideration. Frequently, groups produce "slick" folders and brochures while economizing on activities and materials which can make the conference more exciting and meaningful to those who attend. Also, if the conference is being financed by government or from voluntary donations, very slick brochures may be considered a waste of conference funds because of their temporary nature. A reasonably simple folder can serve the needs of most groups, if the theme selected is appropriate and the information provided explicit.

Registration forms should always include the time, location, registration fee (if any), and rough outline of the program. If the form is not pre-addressed, a return address must also be included.

Those with limited funds might use amateur artists and printers enrolled in vocational schools or community colleges to reduce printing costs. Work might also be done by centres for the handicapped. If planning to use a professional printer, it is preferable to give your contract to businessmen in the community where you wish to hold the conference.

## **SELECTING A DATE AND TIME**

Conferences for professional groups are usually held within business hours during the slackest period of the year for the particular group. However, community conferences must be scheduled outside business hours to allow working people to attend. The summer months prove unsatisfactory since a large number of people are away from home on weekends and vacation periods.

The length of the conference must be determined on the basis of content, the structure of the program, and the possibility of participants attending for any given period.

## **SELECTING ACCOMMODATION**

In selecting accommodation for a conference, consider the following:

- ( 1) Will guests require overnight accommodation? If so, is it available at the same location or in the immediate vicinity? Will all guests be able to stay in one place? Is the cost of overnight accommodation prohibitive for the non-subsidized guest?
- ( 2) The need for a registration area if guests have not been pre-registered.
- ( 3) The size of your potential audience if you have not pre-registered.
- ( 4) The availability of facilities such as sound systems, electrical outlets, black-out curtains, air-conditioning, auditoria.
- ( 5) Size and type of rooms available.
- ( 6) Parking and/or connections with public transportation.
- ( 7) What meals and social activities can be provided on the premises or in the immediate vicinity?
- ( 8) Access to the building prior and subsequent to the conference.
- ( 9) Building regulations re smoking, posting bills, serving of food and beverages, etc.
- (10) Display areas.
- (11) Proximity to social activities in the city.
- (12) Total cost of accommodation.

## REGISTRATION

Particularly if the conference is a large one, at least three weeks is required to finalize arrangements for meals, workshops and the allocation of accommodation for individual activities.

In planning either a one day or a very large conference, it is preferable to either pre-register guests by mail or on the evening prior to the conference program. If sufficient funds are available, hosting an informal reception after the evening registration is one effective means of allowing participants to meet and exchange ideas prior to the conference itself.

If pre-registering, program registration forms should be mailed out six weeks before the conference allowing participants about three weeks to return them.

Considerable time can be saved if receipts, lapel cards, meal tickets, admission cards for individual sessions, etc., can be mailed out to those registered prior to the conference. If the group is a very mixed one, it is also desirable to send out any information or reading materials at this time.



Whether or not participants are pre-registered, a small registration desk is required with alphabetical lists of all those registered and the sessions to which they have been allocated, as some participants are certain to misplace their tickets or other information. In addition, one may plan to hand out kits or resource material at the conference itself.

One relatively simple way of recording registrations and session choices is by using a wall chart like the following. (Each session should have the same number of squares per line to simplify reading.)

SESSION							MEAL		
1	2	3	4	5	6		1	2	3

As each person registers, an x or  $\checkmark$  is marked under each session to which he is allocated and under each meal he will require. When registration is closed, it is relatively simple to select the accommodation for each session on the basis of numbers enrolled and the facilities required.

If, on the other hand, one wishes to have sessions of the same or limited size, persons can be assigned to similar or related sessions where one is over-subscribed or, a second session in the same subject area can be set up.

If all participants are allocated to the sessions of their choice, such a chart is very helpful in planning future conferences as a graphic illustration of the general areas of interest of those who are likely to attend.

For smaller conferences, with no meals provided or where meal tickets can be sold at the opening of the conference, registration may be carried out the morning of the program. However, for a conference of more than 100 people, it is not advisable to attempt to register the first day of the conference.

To set up a registration desk, registration cards should be set out with pencils so that participants can pick them up and fill them in

themselves. It is advisable to request that registrations be printed as some handwriting is illegible. The main registration desk can then be divided into alphabetical sections (e.g. A-E, F-L, M-Q, R-Z), the range of each unit varying with the numbers expected.

If money is to be exchanged, someone should be delegated to set up and receive the cash for each section, check cash received against the number registered in each section, and deposit funds either with the hotel or in a bank.

Lapel cards must be typed or handwritten, receipts filled out, and resource material or kits handed out.

Again, depending on the size of the conference, all of these duties may be performed by one registration person, or work may be divided among cashiers, registration clerks, and information staff.

## **SIGNS AND DIRECTIONS**

Conference planners often become so familiar with the conference site that they tend to overlook the need for signs and directions.

If one is using a very large building with an unusual floor plan or if activities are spread out throughout the building, it is sometimes advisable to provide participants with a floor plan indicating individual activities and facilities. In addition, large, colourful or striking signs should be posted in all places where persons might go in alternant directions. In a hotel, many of these signs will be provided. However, in schools and community halls, the responsibility for making and posting signs rests with the conference organizers. One may find, too, that the building selected has special regulations regarding the kinds of signs which may be posted and the kinds of adhesives or staples used.

At all times, at least one person should be on the registration desk to provide information and directions to those who have lost their way.

If finances permit or if volunteers are available, guides can be very helpful in large centres such as universities, community colleges and huge civic buildings.

## CONFERENCE STRUCTURE

The way in which activities are structured is perhaps the most important factor in determining the kinds of learning, interaction, involvement and commitment which will result from your efforts.

What can be done, then, to animate, stimulate or educate a group of people?

Consider the various activities and experiences a conference might include and the primary function they serve.

### Activity

Speech or Lecture

Group Interview

Symposium

Forum

Panel

Debate

Film

Demonstration

Tour or field trip

Film

Display or Exhibit

Multi-Media Environmental

Experiences

Experiential Training Session

Brainstorming

Buzz Groups

Workshops or Seminars

Question and Answer Sessions

Under Fire Panels

T. Groups

Discussion Groups

Meals

Social Activities

Evaluations

Polls

Surveys

### Primary Function

To convey a specific message or ensure that all in attendance have a minimum of information about the issues at hand.

To provide an opportunity for learning through direct involvement or experience.

To provide an opportunity for dialogue and feedback.

To provide an opportunity for participants to meet and exchange ideas on a very informal level.

To provide an opportunity for participants to express their views on the issues discussed and on the conference in general.

Certainly structure alone cannot make a conference effective. Your success in attracting the group you hope to reach, the quality of speakers, resource people, films, displays, etc., will also be major factors. However, "good" people can be highly ineffective if structure is not given careful consideration.

We must then:

- (1) Convey information
- (2) Create an environment that is conducive to good communication and learning
- (3) Provide opportunities for the immediate involvement and participation of those in attendance
- (4) Promote dialogue
- (5) Provide an opportunity for guests to evaluate the conference

In order to arrive at concrete decisions at a larger conference, it is essential that the group be broken up into smaller units.

Again depending on your aims, small groups may assemble voluntarily, the group may be evenly divided alphabetically, numerically, by age, by sex, or by interest, or the planning body may choose to arbitrarily assign participants to individual groups to ensure the broadest possible representation in each.

## **SELECTING SPEAKERS, PANELISTS, FILMS, DISPLAYS or MULTI-MEDIA PRESENTATIONS**

If the central feature of the program is to be a speaker or panel, one needs people who are dynamic, controversial, and well informed. An equally important factor is their ability to relate to the group on its own terms. Participants should be able to relate to the resource people as well as the issues.

At a community conference, resource people should be chosen from all socio-economic and educational levels.

Ask those selected to submit an outline of what they propose to say or do prior to the conference. Such submissions give the sponsor a better idea of what will be covered and secondly, provide him with a framework for the conference report.

Films may focus on a single point of view, present a variety of points of view and experiences while drawing no conclusions, or present a number of alternatives while strongly supporting one of them. The N.F.B.'s *Alinsky* series or the A.F.B.'s *Ghetto* for

example are effective since they evoke a highly individual response on the part of the viewer. A film which presents objective, yet general views on issues such as poverty, teacher training, community development, etc., often requires supporting activities to generate dialogue. Films selected or produced should be in hand at least two weeks prior to the conference for previewing.

Slides, film strips, film sound tracks, samples of natural and man-made products and other visual aids can be used very successfully to convey information through direct experience. If the content is familiar to the group, people may selectively perceive those things of which they are already aware. To avoid this, it is preferable to present familiar but unrelated sounds, smells and images simultaneously to alter one's normal perception of things. Tours and/or displays can also be used to convey information.

## **SELECTING DIALOGUE ACTIVITIES**

Large meetings or question and answer sessions can be very effective when the issues at hand can be clearly defined or identified. However, for more general areas of concern, a few speakers may dominate the session while the majority neither participate nor involve themselves in the discussion.

In dealing with issues where the response is likely to be highly individual, small workshops, sensitivity groups, or under attack panels provide greater opportunity for individual expression.

Any conference which brings together many people who are not acquainted with one another should include some kind of informal social gathering.

## **CHOOSING SESSION RECORDERS**

If a session has only one or two speakers at the front of the room, the most effective way of recording it is on tape. However, for workshops and seminars, taping is not always adequate or even desirable. If the volume is set sufficiently high to pick up all the voices in the room, it will also pick up coughs, feet shuffling and whispering. Such tapes are virtually impossible to transcribe and the cost of transcription can be staggering.



If the content of the session must be recorded verbatim, one should use a secretarial team, as relatively few secretaries can take shorthand for a full hour with no break. If, on the other hand, one requires only a general or point form report on proceedings, one person who is relatively knowledgeable in the field can fulfill this role. If a group does not have the resources to hire secretaries or rent tape recorders, one might consider hiring students in business courses or recruiting volunteers.

Reports on all sessions ought to be submitted to the sponsor by, at the latest, a week after the conference.

## **PROVIDING FACILITIES FOR THE MEDIA**

In order to obtain the best possible coverage in the communications media, it is advisable to notify the press and local radio and T.V. stations of the event approximately two months in advance. Follow up this notification with a press release giving as many pertinent details as possible about two weeks before the conference and a 'phone call perhaps three days beforehand as a reminder. In most cases, the various media will indicate whether or not they plan to attend. If T.V. representatives have indicated an interest in the conference, find out what facilities or special equipment they will require and ensure that they are available (e.g. pre-arranged interviews and space for same, mobile unit parking, advance set-up time).

Where possible, reserve a separate room for the use of media people exclusively which is staffed by a person qualified to discuss the aims and objectives of the conference planners and details of the program.

If material has not been forwarded in advance, have on hand additional copies of the conference program, a list of session chairmen and resource people, a map or directions indicating the location of the various sessions and passes to all conference activities, should they be required. All of this material can be provided in a kit along with a lapel card. In addition, a press room should have a few writing tables, one or more telephones and space where elaborate equipment can be left for safekeeping.

In many instances, it is not possible to have the press room adjacent to the registration desk and a press table is required at the door to provide information.

Where it is not possible to provide a press room, a special desk at the main door can fulfill many of the same functions.

As an added note, a great deal of inconvenience to both conference participants and media representatives can be avoided if seats for media people either on an aisle or near the door are reserved in all conference sessions including meals.

## **SETTING UP DISPLAYS**

Displays may include audio-visual presentations, information handouts, books and brochures for viewing or art work.

If planning a book display only, one may contact the Canadian Book Publishers Council who will notify the publishers in the area about the conference and advise the sponsor as to who will attend. However, for displays of any particular type of product, manufacturers must be contacted directly.

The invitation should include details such as the size and shape of space available to individual participants, existing electrical outlets, lighting and drapery, viewing hours and deadlines. When all arrangements have been made, a simple floor plan of the display area, indicating where each participant is to be located should be drawn up.

More elaborate displays involving film showings, multi-media experiences, etc., can prove costly unless one is successful in finding manufacturers who are willing to provide materials and set up the display as a form of publicity.

## **ARRANGING MEALS**

As soon as the location has been chosen, select menus for the various meals required.

If the accommodation selected does not provide catering services, commercial catering firms must be contacted. Beware of buffet style meals for conferences of more than 200 people as a minimum of two hours is required to serve a large number. A fixed menu enables staff to place a number of items on the table before the luncheon period and greatly speeds up the service of the main courses.



Luncheon prices will vary from \$2.00-\$6.00 per person while dinner prices may reach \$8.00-\$10.00 per person if provided by a profit-making organization. Where funds are extremely limited, one might look into the possibility of using church groups or women's service clubs as caterers. In most instances, bar facilities should be provided at the consumer's own personal expense.

When ordering food, one should consider such things as the combined attractiveness of the various items, whether or not it can be cooked ahead of time and kept warm, whether or not it is acceptable to all religious groups who will attend, its price in relation to your total budget, its general popularity (avoid unusually seasoned or rare foods) and, if buying directly, whether or not it is seasonal (e.g. fresh fruit desserts may cost more than \$1.00 per person in the winter months).

If arranging a small reception for 25 to 30 people, it is usually more economical to rent a room or suite at full cost and bring in one's own refreshments. If buying hors d'oeuvres or coffee for such a reception, it is recommended that you buy food by the platter and coffee by the urn rather than on a per capita basis.

## CONFERENCE EVALUATION

In drawing up a conference evaluation, one should consider the following:

- (1) degree to which the conference achieved initial goals
- (2) validity of initial goals and priorities.
- (3) reaction of guests to individual conference sessions and activities, and to the conference as a whole.
- (4) degree to which attitudes, values and/or commitments were changed by the conference itself.
- (5) suggestions from participants as to how the conference might have been improved.
- (6) suitability of accommodation and facilities.

It is often helpful to ask questions regarding issues and hopes for the conference both prior and subsequent to the conference to determine whether or not any significant changes in attitudes, values, or points of view have taken place.

If the conference was designed to promote individual or social action, make an effort to obtain some follow-up as to what immediate action followed the conference, and how long such action was sustained.

## THE CONFERENCE REPORT

One should attempt to produce and distribute the conference report before interest wanes. It is preferable to provide a reasonably simple report promptly than to spend months preparing a slick piece of printing and journalism. To expedite the production of the report, all persons making any kind of presentation should be asked to provide the sponsor with a reproducible draft just prior to the time of the conference. In addition, recorders of individual sessions ought to be given a deadline for submitting their reports.

By having large sections of the report written by program participants, production becomes a job of editing and composition rather than of writing. With this technique, there is less chance of misinterpreting or misrepresenting what has been said. If staff must be specially engaged to write a report, much time may be lost in getting the approval of the many resource people who have taken part in the conference.

In some instances, the planning committee may feel that they all should share in the production of the report. However, this arrangement is rarely successful as individuals will have different writing styles and different approaches. In the event that this desire is expressed, usually a few meetings will bring out the many problems involved in this arrangement. It is preferable to have all content approved by the planning committee while assigning one or two persons to write the material.

## A CHECK LIST FOR THE CO-ORDINATOR

This list is by no means all inclusive but can serve as a helpful guide to the novice in this field.

### A. Date, Time & Location

- (1) Does the date selected conflict with any major local event?
- (2) Is the time selected suitable for those with families, those who are employed, those from out-of-town, etc.?
- (3) Is there sufficient accommodation available for out-of-town guests?
- (4) Does the accommodation selected have such facilities as:
  - (a) overnight accommodation
  - (b) a theatre or blackout curtains for films

- (c) sufficient electrical outlets for equipment required
- (d) catering services
- (e) rooms for all small or large groups you intend to have
- (f) accessibility for setting up and dismantling displays, etc., prior and subsequent to the conference
- (g) a public address system
- (5) How much time will be lost in emptying rooms, moving people from one room to another etc.?
- (6) Will people have difficulty finding their way around?
- (7) Is there parking available and public transportation to accommodation at appropriate times?

## **B. Mailing Lists**

- (1) Have you all mailing lists in hand and all envelopes typed so that material can be sent out by the deadline you have set?
- (2) Have you covered all the interest groups who might attend?
- (3) Are you planning to restrict registration? If so, how will you determine who is to be invited?
- (4) Have you sent invitations and materials to special guests who may not be able to attend the entire conference?

## **C. Registration**

### **Pre-registration**

- (1) Does your form include a conference title which indicates the theme and tone of the conference; the location; the name, business address, home address and telephone numbers of participants; a return address so that it will be directed to the proper person; a list of facilities available (e.g. parking, babysitting); the registration fee, if any; to whom cheques or money orders should be made out; the registration deadline date; a general outline of the program and a list of sponsors.
- (2) Is your registration form being sent out early enough to allow time for its return and confirmation?
- (3) Do you have an alphabetical list of all those registered at the front desk in the event that some participants lose their admission cards, meal tickets, etc.?
- (4) Will you accept registrations at the door?
- (5) Have you any way of knowing the identity and number of those registered who actually arrive?

- (6) Is a dinner count required or are you paying for a minimum number? If accepting late registrations, is your estimated count adequate?
- (7) Are name tags already filled out? If not, have you considered what information you wish to have on them (e.g. name, organizations, locale or city, interest groups)?

### **Same-Day Registration**

- (1) Do you have sufficient staff to process the numbers anticipated in the time allowed for registration?
- (2) If accepting money, do you have sufficient change in your cash set-up and have you arranged for its safe-keeping when registration is closed?
- (3) Do you have registration forms, pencils, paper, programs, kits, etc., on hand?
- (4) Note 6 and 7 in the previous paragraph.

### **D. Speakers, Panels, Workshops, Etc.**

- (1) Have you given each speaker or resource person a detailed written outline of his duties and responsibilities, where he will be located, the time he is allotted, etc.?
- (2) Have you checked with all resource people as to whether they will require any special equipment? If so, have you arranged for it to be on hand?
- (3) Have you on hand drafts of all speeches and presentations to be given by resource people?
- (4) Are the rooms selected sufficiently large and adequately equipped for the particular group attending each session?

### **E. Administrative Staff**

- (1) Have you prepared a detailed list of all the duties of each staff member of the conference to avoid overlooking certain details while duplicating efforts in another area?
- (2) Have you given each staff member a list of not only his own duties, but those of all other staff members as well so that each person can give out information to participants should they have any questions?
- (3) Have you arranged a work schedule for staff allowing for coffee breaks, luncheon, etc.?

#### **F. Meals and Coffee**

- (1) Have you allowed sufficient time in your program for meals and coffee breaks?
- (2) Will it be necessary to stagger groups for meals?
- (3) Do you plan to have a head table? If so, have you arranged for decorations, seating, microphones, etc.?
- (4) Have you made arrangements for a final dinner count to caterers?
- (5) Do you have staff to collect meal tickets?

#### **G. The Day of the Conference**

- (1) Have you arranged to meet with all staff to ensure that everyone is on duty, is aware of his responsibilities, and has whatever equipment he requires on hand and in working order?
- (2) Are all conference functions clearly marked by signs, etc.?
- (3) If you have a large group in a theatre or auditorium, have you arranged to have them enter or exit by a number of doors if your day is tightly scheduled?
- (4) Have you arranged to have all sessions recorded? Tape recorders are of limited use for large groups where a number of people are speaking.
- (5) Will meals and coffee be served as scheduled?
- (6) Have you lists of the duties of all staff people in hand so that you can locate anyone you might need?

#### **H. After the Conference**

- (1) Have you arranged for the removal of equipment, displays, etc.?
- (2) Have you received invoices and paid all staff people?
- (3) Have you drawn up some method of evaluating the conference?
- (4) Have you copies of all presentations, papers, speeches, etc., in hand for the conference report plus all tapes and scripts of session recorders?
- (5) Have you envelopes addressed for the mailing of the report?
- (6) Have you appointed a staff member to edit materials and write up the report? Do you wish to enclose an evaluation form?

## **I. Tips for the Co-ordinator**

- (1) Always prepare a detailed budget, plan of the day's activities and planning schedule or check list of your own duties.
- (2) Select a chairman who can abide by the schedule set out. If you plan to start at 9:00 a.m., for example, proceed even though all people may not be in their seats. By so doing, participants will realize that you plan to stay on schedule for the duration of the conference.
- (3) Make sure that the chairman has a detailed outline of the program in terms of time, staff, etc. Also provide him with a script indicating each time he is required to speak. Frequently, chairmen will overlook thank you's, acknowledgements, or announcements without such assistance.



CONFERENCE PLANNING SCHEDULE

COMMUNITY

NAME OF CONFERENCE
LOCAL CO-OPERATING ORGANIZATION
DATE AND TIME

EXPLORATORY VISIT AND MEETINGS

CONTACTS	DATE

PRELIMINARY REPORT

DATE	IMMEDIATE SUPERVISOR	INTERMEDIATE SUPERVISOR	ULTIMATE SUPERVISOR
SUBMITTED			
APPROVED			

PLANNING COMMITTEE SELECTED

NAME	ORGANIZATION – ADDRESS	PHONE NO.

PLANNING COMMITTEE MEETINGS


CONFERENCE PLANNING SCHEDULE (Cont'd.)

MAILING LISTS		DATE TO BE SUBMITTED BY	
CONFERENCE STRUCTURE – PROGRAM OUTLINE			
SUGGESTIONS FOR CHAIRMAN AND KEY SPEAKER			
PREPARATION OF BUDGET		DATE	
PROGRAM OUTLINE AND BUDGET SUBMITTED FOR APPROVAL		DATE SUBMITTED	DATE APPROVED

SPECIAL INVITATIONS

DATE	NAME – POSITION	DATE REPLIED	Accepted	
			Yes	No

PRESS RELEASES

DATE PREPARED	DATE SUBMITTED	DATE APPROVED	DATE RELEASED
1			
2			
3			

CONFERENCE PLANNING SCHEDULE (Cont'd.)

DISPLAYS	
LOCAL SLIDES – PICTURES	TO BE OBTAINED BY
TAPE RECORDER	
FILM	
PROJECTORS	
BULBS	
CORDS	
ORGANIZATION'S LITERATURE	

DATE SHIPPED	DATE RECEIVED	RECEIVED BY
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PARTICIPATION OF OTHER ORGANIZATIONS IN DISPLAYS

SPECIAL EQUIPMENT REQUIRED
PROVIDED BY HOTEL OR HALL

SHIPPED BY PLANNING GROUP

SPECIAL SERVICES REQUIRED

PRINTING – PROGRAM, REGISTRATION FORM, AND QUESTIONNAIRE		
COPY PREPARED AND SUBMITTED	COPY APPROVED	COPY SENT TO PRINTER
RECEIVED FROM PRINTER	DATE MAILED	NUMBER RETURNED

CONFERENCE PLANNING SCHEDULE (Cont'd.)

WORKSHOPS -- SUBJECT AREA	GROUP LEADER	DATE FINALIZED

SUBMISSION OF SPEECHES OR RESOURCE MATERIAL

RESOURCE MATERIAL	SUBMITTED BY	DATE SUBMITTED

SPACE ACCOMMODATION

ROOMS AVAILABLE
ALLOCATION OF SPACE

ACCOMMODATION FOR OUT OF TOWN GUESTS

NO. AND TYPE OF ROOMS	DATE BOOKED

MEALS

LUNCHEON	TIME
COFFEE BREAKS	TIMES

### CONFERENCE PLANNING SCHEDULE (Cont'd.)

RECEPTION - IF ANY

## REGISTRATION PROCEDURE

### SUBMISSION OF WORKSHOP REPORTS AND DATE REQUIRED

## CONFERENCE REPORT

DATE COMPLETED \_\_\_\_\_

DATE SUBMITTED FOR APPROVAL

DATE APPROVED \_\_\_\_\_

DATE TO PRINTER

DATE RECEIVED

DATE MAILED

**CONFERENCE PLANNING SCHEDULE (Cont'd.)**[illegible]

























